

Northern Saskatchewan
Tourism Task Team

Northern Tourism Industry Assessment
Final Report

December, 1999



AE Anderson/FAST
& associates

**Northern Saskatchewan Tourism Task Team
Industry Assessment - Final Report**

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Industry Assessment - Final Report**

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Northern Saskatchewan Tourism Industry Assessment: Baseline Industry Report

At the Forum '98 Northern Business Conference on Tourism, delegates expressed strong interest in continuing the process of tourism industry planning and development for northern Saskatchewan. For this reason, Northern Affairs created the Northern Saskatchewan Tourism Task Team, a body consisting of representatives of the northern tourism industry, regions, sectoral associations, and related supporting agencies.

The primary objectives identified by the Task Team were: "to identify a process to achieve a coordinated approach to tourism planning and development in northern Saskatchewan; to identify the appropriate role that each of the stakeholders can play in this process; to identify the industry challenges that must be considered in this planning and development process; and, ultimately, to identify specific sustainable tourism opportunities in northern Saskatchewan".

One of the immediate requirements identified by the Task Team was the need for a detailed review and analysis of existing tourism studies, research, strategies, and plans relevant to the northern tourism sector. The resulting study would assess the current state of the tourism industry in northern Saskatchewan and provide a common base of information for broad-based reference and use by northern economic development organizations. The study would also review and assess the numerous issues and challenges, as identified by the Northern Tourism Task Team, which currently limit further development of the tourism industry in northern Saskatchewan.

The Task Team developed detailed Terms of Reference for the study and issued a Request for Proposals to a number of consulting firms for consideration. The proposals were evaluated by a working committee of the Task Team and a formal consulting engagement was initiated with Anderson/Fast and Associates. The Task Team then provided detailed input and direction to the consulting team in the completion of this study.

This study of the tourism industry in northern Saskatchewan provides the foundation to proceed with a second phase comprehensive strategy for the northern tourism industry. This report will also be shared with the Interim Northern Development Board in support of the Northern Strategy.

The study reflects a one-year commitment of time, energy, and creative thought by Task Team members. I would like to thank the members of the Northern Saskatchewan Tourism Task Team for their contribution to this process. I would also like to thank the Anderson/Fast consulting team for their thorough and committed approach to this initiative.

Sincerely,

Jim Bogard
Chairperson, Northern Saskatchewan Tourism Task Team

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**Northern Saskatchewan Tourism Task Team
Interim Report**

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Section 1.0

Project Introduction

1.0 Project Introduction

1.1 Background

The Northern Saskatchewan Tourism Task Team (NSTTT) is comprised of representatives from the tourism industry in northern Saskatchewan. It is a coordinating body with representation from northern tourism industry stakeholders, Aboriginal Business Canada, Saskatchewan Environment and Resource Management, and Saskatchewan Northern Affairs.

In January of 1999, the NSTTT solicited proposals for the first phase of a comprehensive sectoral study of the northern Saskatchewan tourism industry. Anderson/Fast & Associates was contracted in March of 1999 to undertake the first phase.

1.2 Purpose of the Sectoral Study

The purpose of this study is to develop a common base of knowledge through the identification, analysis, and integration of northern content in the various existing tourism strategies, studies, and plans relevant to the tourism sector in northern Saskatchewan. Specifically, the requirements of the first phase of the sectoral analysis include the following.

Background

- ▶ Provide a brief historical background of the development of the tourism industry in northern Saskatchewan;
- ▶ Identify and review existing research and organizational development relevant to the tourism sector in northern Saskatchewan;
- ▶ Develop a comprehensive inventory or bibliography of relevant tourism sector studies, strategies, and plans, including author, proponent, date, and brief synopsis of each;
- ▶ Develop a comprehensive listing of tourism organizations in, or related to, the northern Saskatchewan tourism industry, including key contact(s), mandate, objectives, role, and a summary of activities for each;
- ▶ Identify and review existing research, land use plans, and agreements for the northern industrial sectors which may impact the tourism sector; and

- ▶ Develop a comprehensive inventory of legislation and regulations affecting the tourism industry in northern Saskatchewan.

Current State of the Industry

- ▶ Conduct a detailed review of existing studies, research, strategies, and plans and complete a summary of northern content for each, including an identification of market considerations (existing and potential), and an identification of development potential, challenges, and/or constraints (market, human and financial resources, transportation, communications, attractions, and commercial services).

Sectoral Analysis

Based on the comprehensive review and analysis of existing studies and research, and the identification of the relevant northern content, complete a strategic analysis of this information.

- ▶ Focus on content that is relevant and significant to the current industry in northern Saskatchewan;
- ▶ Eliminate those studies which are outdated, irrelevant, or redundant;
- ▶ Develop a market trend analysis of existing and emerging markets;
- ▶ Complete a detailed analysis of the identified strengths, weaknesses, opportunities, constraints, and limiting factors for the relevant content; and
- ▶ Develop a tourism resource inventory including existing and potential cultural and natural attractions, natural destination market areas, events, service centres, facilities (outfitting, accommodation, campgrounds, and recreation sites).

Integration of Identified Materials

As follow up to the detailed analysis above, undertake an integration of study material relevant to the tourism industry in northern Saskatchewan. This integration should include consideration by the following:

- ▶ Integration by tourism vertical markets (outfitting, outdoor adventure, general touring, ecotourism, business travel, winter tourism, heritage tourism, etc.);

- ▶ Integration by geographic area (Northwest, Northcentral, Northeast, Athabasca); and
- ▶ Integration by identified natural destination market areas.

Conclusions and Recommendations for the Northern Tourism Sector

- ▶ Provide detailed recommendations concerning second phase study initiatives for the northern Saskatchewan tourism sector, including specific study priorities to be included in the terms of reference, and research and development issues to be addressed.
- ▶ Provide recommendations for second phase study initiatives respecting policies for the tourism industry in northern Saskatchewan. As necessary, suggest modifications to current policies, programs, and initiatives as well as the tourism organizations and assistance required to accomplish the identified role; and
- ▶ Recommendations on other relevant issues.

1.3 Scope of Work

A work plan was developed by Anderson/Fast & Associates that addressed the requirements of the study as outlined in the terms of reference. Generally, the work plan was designed to address three main study components: the preparation of an inventory of northern tourism product, the development of a research directory, and the framing of the key issues influencing the development and marketing of northern tourism.

The work plan consisted of eight main phases which are presented below.

Phase One - Project Initiation and Scoping

A project initiation meeting was held during which the project objectives were discussed. The meeting ensure that there was a common understanding of all objectives, roles, responsibilities, and reporting relationships.

Phase Two - Baseline and Resource Assessment

In this phase, our team first prepared a short history on the development of tourism in northern Saskatchewan. A typology was developed to represent the different product groups of that together make up the northern tourism industry and each of these groups

were profiled through the development of an inventory and the mapping of this inventory as it existed in northern Saskatchewan at the time of this study. The study team also prepared a listing of the different organizations that are currently involved or connected to tourism in the north.

Phase Three - Assessment of Secondary Research

In this phase, our team collected a range of secondary strategies and studies considered to be relevant to tourism in northern Saskatchewan. A framework was developed for the purpose of assessing and presenting each of these documents into a functional directory. This directory was designed to give an effective overview of the current research that exists, as well as to provide an efficient map for industry representatives from the north.

Phase Four - Review of Non-Tourism Industry

As an industry, tourism does not function in isolation of other northern industries. In this phase, our team worked to provide a useful picture of the other northern industries that impact the resources of interest to the tourism industry. A listing of relevant organizations serving these industries was prepared, and a general directory of relevant industry studies was also compiled. As a final step in this phase, an overview of key policies and regulations was prepared.

Phase Five - Integration of Research

Phase Six - Market and Performance Review

The tourism market was assessed in Phase Six as it relates to the current and potential tourism product the north has to offer. The current position and performance of the industry in Saskatchewan was discussed through the application of key indicators, and the overall state of readiness of the northern tourism industry was assessed.

Phase Seven - Identification of Second Phase Study Initiatives

Phase Seven was designed to address the identification and prioritization of industry issues, and to clearly present the study objectives for the second phase of the sectoral analysis. In this phase, a typology was developed for the purpose of grouping issues, profiles were developed for each issue, and the issues were ranked in terms of importance. Recommendations related to policies considered to be linked with specific issues were also discussed. Flowing from this, the terms of reference for stage two of study were established.

Phase Eight - Finalize Documents

In this final phase, the content of the study document was reviewed and finalized by the NSTTT committee, and the final report was prepared.

1.4 Structure of the Report

This report has been organized in seven main sections, including this introduction which provides a background to the project. Section 2.0 presents an overview of northern tourism, and includes the inventory and profile of the current tourism product found in northern Saskatchewan and the representative organizations that have some linkage with tourism.

Section 3.0 of the report presents the directory of tourism research. This includes a listing of related documents and an assessment of their relevance to northern tourism. Section 4.0 of the report contains an overview of non-tourism industry organizations and operators linked with the north and its resources.

Section 5.0 of the report presents a discussion on tourism markets and identifies a set of key implications for the north. The industry issue identification and discussion is presented in Section 6.0, and the recommendations regarding the requirements for future study and planning are contained in Section 7.0.

Section 2.0

Baseline and State of Resource

2.0 Baseline and State of Resource

2.1 Introduction

The region of interest to this study is defined by the boundaries of the Northern Administration District (NAD) of the province of Saskatchewan. This district is shown in Exhibit 2.1 on page 2-2 and identifies the communities and Indian Reserves within it. It is important to note that although many residents and tourists consider the 'north' to include destinations such as Meadow Lake Provincial Park and Prince Albert National Park, these attractions fall outside of the region of study. However, these two parks are shown on all exhibits due to their proximity to the NAD.

Tourism in northern Saskatchewan comprises a wide range of product and is represented by a diverse mix of industry stakeholders. The objective of this section is to put a face to the northern tourism industry through preparing a concise inventory and profile of both the product and the stakeholders.

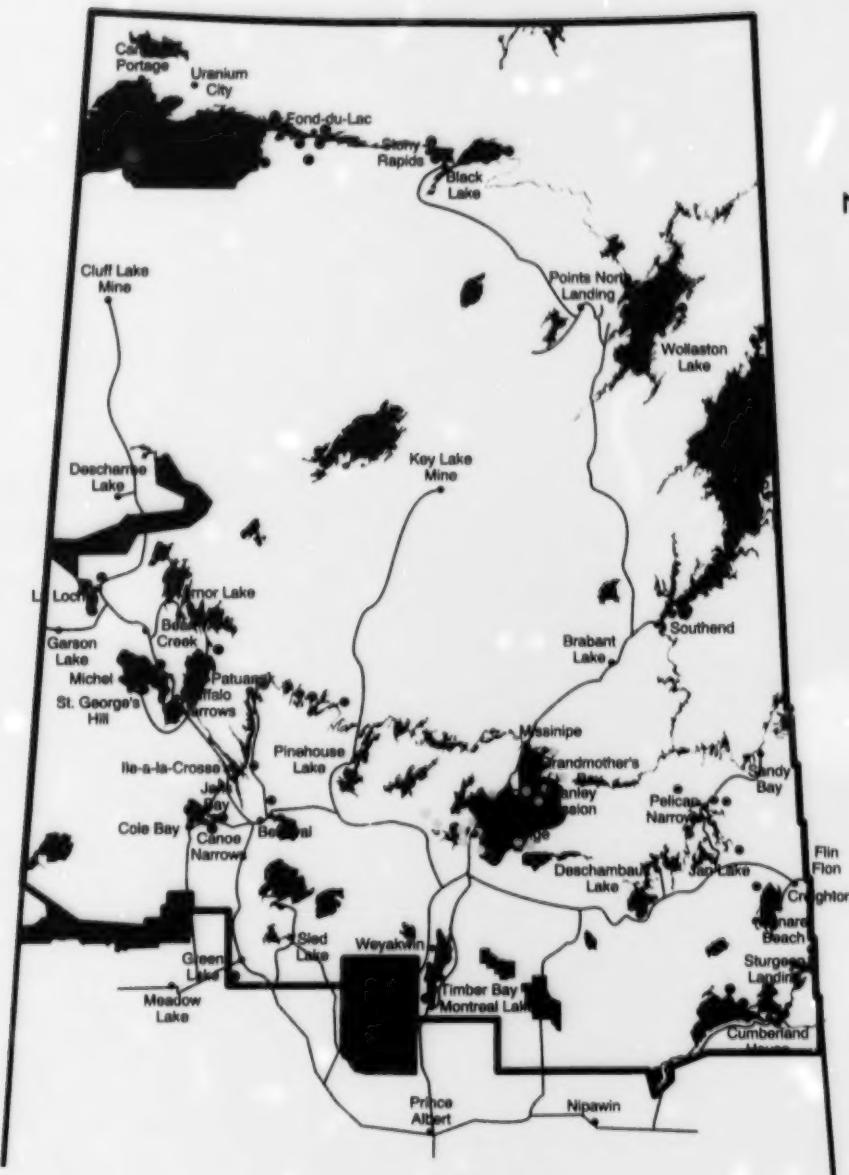
A typology has been prepared that generally groups the tourism product or tourism assets of the north for the purpose of establishing a profile of the industry. A discussion of organizations that have some connection or link with the industry of tourism in the north is also included in this section.

2.2 History of Northern Tourism

Tourism has been defined as 'travel more than 80 kilometres for the purposes of business or pleasure.' By that definition, the first known tourists in northern Saskatchewan were the Chipewyan Indians, whose travels for the purposes of hunting and gathering carried them into northern Saskatchewan from the Northwest Territories. While the Chipewyans were relatively nomadic in their lifestyle, they gathered together for the purpose of hunting during the migrations of the great caribou herds.

The first European arrived in Saskatchewan in 1690 as an agent of the Hudson's Bay Company. Subsequent explorers of the 1700's entered Saskatchewan through the northern and central parts of the province, primarily via the Churchill and North Saskatchewan Rivers. While these explorers were essentially looking to establish trading routes and partners, there were also those who were looking for a cross-continental route to the Pacific Ocean. It is safe to say Saskatchewan was opened up to European settlement from the north part of the province.

**Exhibit 2.1 -
Northern Administration
District**



First Nations

- Fond Du Lac
- Black Lake
- Hatchet Lake
- English River
- Big C
- Turnor Lake
- Buffalo River
- Canoe Lake
- Lac La Ronge
- Montreal Lake
- Peter Ballantyne Cree Nation
- Cumberland House

(Each coloured dot
represents an individual
Indian Reserve)

Source: The template for this map and all subsequent maps was provided by Saskatchewan Post-Secondary Education and Skills Training, La Ronge, SK

A prosperous trade in animal furs that began in the 18th century led to the establishment of fur trading posts and forts along the various waterways of northern Saskatchewan. Some of these became permanent — the oldest permanent settlement in the Western Canadian interior was set up as a fur trading post at Cumberland House in 1774 — beginning the establishment of settlements with names familiar today.

Following a century and a half of fur trading, valuable minerals were discovered in northern Saskatchewan. The mines that were established required infrastructure connections with their markets and the people who came to work them needed additional services. The communities and roads that linked them with the south opened up a part of the north. This was particularly enhanced when the provinces took over resource development in the 1930's via the Natural Resources Act and began to accelerate economic activity in the north.

Gold, zinc and copper discoveries led the way in the mineral development area. More recently, the discovery of the world's richest uranium fields has resulted in considerable activity across northern Saskatchewan, including the establishment and abandonment of one of the larger, and northernmost communities in the area (Uranium City).

Recent expansions in the forestry sector represent a considerable increase in economic activity and growth in jobs for northern residents. This expansion in harvesting has also highlighted the need for careful land use planning in areas where existing tourism operations are in place and/or where tourism potential exists.

Opening of the north to mining and forestry allowed for the establishment of outdoor leisure and recreation facilities based on individual rubber-tire traffic such as lakeside resorts and cottages in the southern part of the NAD. Provincial parks were established, initially Lac La Ronge Provincial Park, followed by Nipawin Provincial Park (now Narrow Hills Provincial Park), Athabasca and Clearwater Provincial Parks. The latter two represent a new category, wilderness, which limits commercial development. A new protected area designation called Representative Areas Network has been established to maintain landscapes and flora/fauna unique to Saskatchewan; a number of these areas currently exist in northern Saskatchewan.

Large-scale outfitting emerged in the 1950's based on the world-class quality fishing experience available in northern Saskatchewan. In the late 1960's, big game outfitting became established in the Cumberland delta. This was largely based on demand for moose. Currently there are approximately 240 fish and game outfitters licensed to operate in the West Boreal Ecoregion, which roughly corresponds to the study area.

Canoe outfitting is a more recent phenomenon with roots in the fur trade. A number of major canoeing outfitters operate in northern Saskatchewan. In addition, almost all of the

56 documented canoe routes in Saskatchewan occur in the north.

A more recent trend that has emerged is called ecotourism. This market term is linked with anything from outdoor adventure to an indigenous learning experience. The common factor in this new market segment is the belief in sustainable tourism. There are a number of operators in northern Saskatchewan who currently cater to this market, but the potential has not yet been fully realized.

The predominant tourism organization in northern Saskatchewan is the Saskatchewan Outfitters Association. In 1967 they gained prominence as a sectoral association representing, largely, fly/drive-in fishing camps and called themselves the Northern Saskatchewan Outfitters Association (NSOA). In the 1980's they expanded to incorporate southern outfitters whose interests were mainly based in outfitting for big game/game bird hunters and took a more provincial name, the Saskatchewan Outfitters Association.

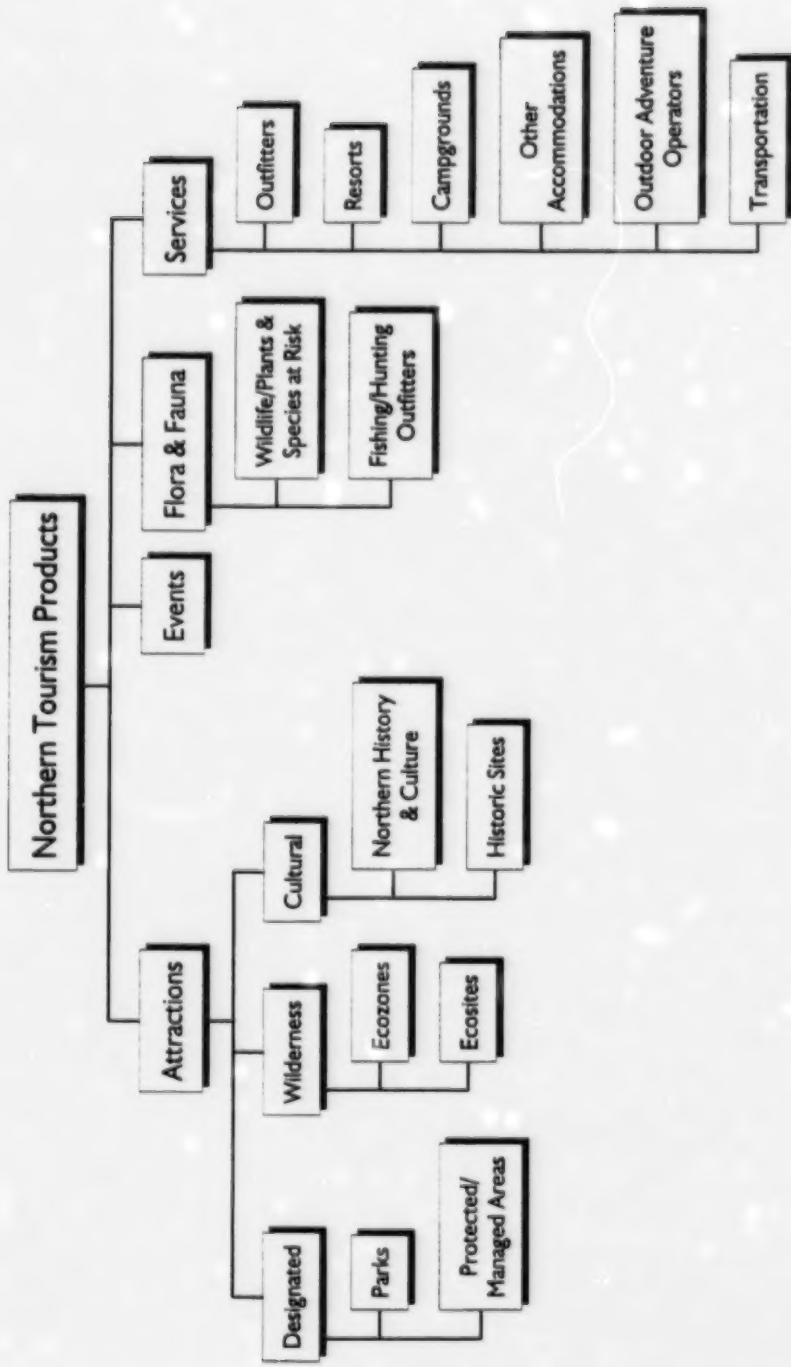
As part of a regional tourism development effort in the late 1970's, northern tourism interest allied into an organization called the Northern Shield. Difficulties with the program in other areas of the province forced the abandonment of this approach, although an organization called the North West Tourism Development Group maintained a regional focus in the southern part of northwestern Saskatchewan until a further attempt at regional organization was undertaken in the early 1990's. This effort was based on the preparation of two tourism destination strategies for northern Saskatchewan, one each for the northwest and the northeast. The strategies formed the basis for industry alliance on a regional basis, but this time called Northern Shores (northeast) and Northwest Saskatchewan Calling.

A reassessment of regional support programming took place in the late 1990's and the two northern regions are being amalgamated at the time of writing.

2.3 Study Typology

The Northern Tourism Industry Typology (page 2-5) has been prepared for the purpose of segmenting northern tourism product into manageable components for the purpose of review and assessment. The consultant team and NSTTT recognize that there are product components that may fall into more than one area, although all product has been grouped into the most appropriate segment for ease of review. For example, northern resorts have been grouped under the service segment even though they directly contribute to the appeal of the northern tourism experience with some market segments.

Exhibit 2.2 - Northern Tourism Product Typology



The typology segments the product into four general groups: attractions, events, wildlife and vegetation resources, and services. Each of these product groups is then further segmented into product subsegments that have different themes.

The four general groups are defined as follows:

- ▶ Attractions - this group accounts for product, other than events, considered having the ability to generate tourist visits and encompass designated, wilderness, and cultural attractions.
- ▶ Events - the product represented by this segment has the ability to function as attractions and/or destinations, although events are differentiated from attractions because they do not exist on an ongoing basis.
- ▶ Flora & Fauna - as a specific product segment, the flora and fauna segment for the north represents the animals, fish, birds and plant life that currently or have the potential to function as core travel generating resources.
- ▶ Services - the final product grouping encompasses services offered to tourists. Services are a critical part of the northern tourism industry, although they do not generally function independently as travel generators.

The typology is meant to provide an exhaustive framework for the listing of all tourism products and services offered in northern Saskatchewan.

2.4 Resource Inventory

In this section of the report, the product of the northern tourism industry is profiled. The typology presented in Section 2.3 is used as a base, and the general objective of the product profiles is to present the magnitude and general locations of each product theme. Wherever appropriate, each product theme has been mapped in exhibit format for ease of review.

It is critical to note that the inventories prepared for this strategy are not necessarily exhaustive and may not account for all the product that may be classified under each segment. The inventories are based upon available secondary information.

2.4.1 Attractions

The attraction product segment includes the following product subsegments: designated, wilderness, and cultural attractions. The discussion of the product under this segment

includes both current attractions as well as those features that might have the potential to attract tourists under the correct development and marketing approach.

This segment includes natural attractions, wildlife, and vegetation. The base ingredients of the northern tourism experience are the forest, the lakes and rivers, and the wildlife. As tourism resources, these elements cover most of the area of study and, consequently, they are difficult to isolate and inventory. It is critical, however, that their importance and significance are recognized — the entire northern tourism industry depends upon these resources.

2.4.1.1 Designated Attractions

Designated attractions represent land areas that have some formal designation — either by a government body or non-government organization. There are numerous levels and types of designations with ranging degrees of policy and protection. For the purpose of preparing an appropriate profile, the designated attraction subsegment has been split further into parks and protected areas.

Parks

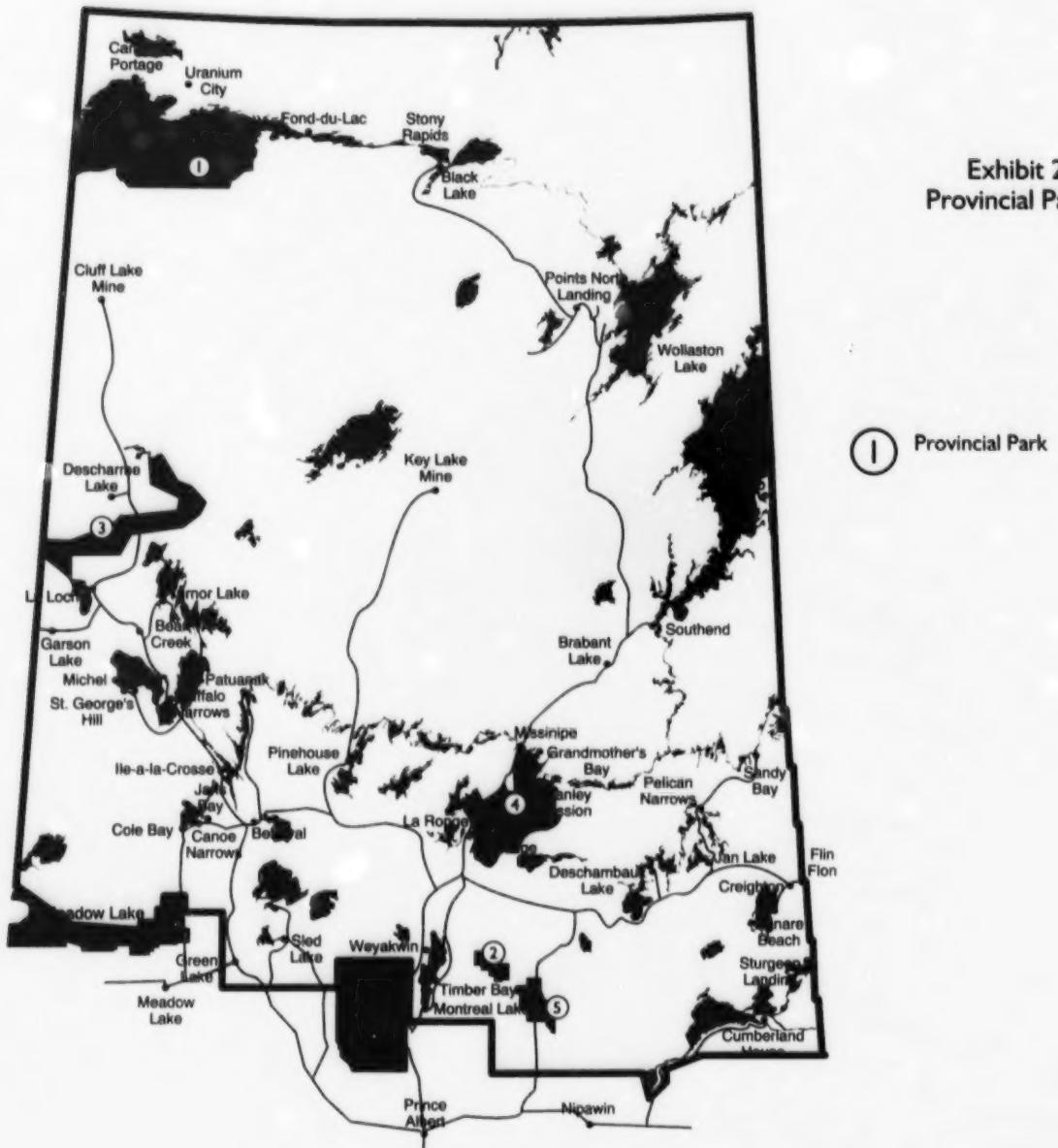
In Saskatchewan, parks generally fall within three classifications: national, provincial, and regional. The NAD has five provincial parks which are displayed in Exhibit 2.3 (page 2-8). There are no national parks located in the NAD, however Prince Albert National Park is visually represented in Exhibit 2.3 due to its proximity to the NAD. Likewise, Meadow Lake Provincial Park does not lie within the NAD, but is included in the exhibit because it borders the area. Cumberland House Provincial Historic Park is also located in the NAD and contains the Cumberland House National Historic Site, both of which are included in Exhibit 2.13 (page 2-28).

The Athabasca Sand Dunes, Clarence/Steepbank, and Clearwater River provincial parks are classified as wilderness parks under the provincial park system.¹ The overall intent of a wilderness park is for representative landscape protection through legal designation. Wilderness parks serve to:

- preserve large and remote tracts of undisturbed Crown land in a natural state, and

¹ The definitions of wilderness and natural environment parks were adapted from both Tourism Saskatchewan's 1999 Accommodation, Resort & Campground Guide and "Saskatchewan's Natural Heritage," 1998 Federal & Provincial Lands Classified by International Conservation Management Categories Poster, Canadian Plains Research Centre, University of Regina, 1998.

Exhibit 2.3 -
Provincial Parks



1. Athabasca Sand Dunes Provincial Park
2. Clarence/Steepbank Lakes Provincial Park
3. Clearwater River Provincial Park
4. Lac La Ronge Provincial Park
5. Narrow Hills Provincial Park

- ▶ allow for the pursuit of low-intensity and non-mechanized wilderness recreation (e.g. canoeing, primitive camping, hiking, photography).

The two remaining northern parks, the Lac La Ronge and the Narrow Hills, are classified as natural environment parks. Natural environment parks are relatively large natural tracts of land which protect representative and unique landscapes found in Saskatchewan. They have a dual goal that includes landscape protection and the provision of appropriate recreation opportunities. Appropriate activities within these parks include camping, angling, canoeing, cross-country skiing, and other outdoor recreation.

Protected/Managed Areas

Protected or managed areas are of interest to tourism stakeholders as they provide varying levels of protection to areas and can be used, where appropriate, as a resource for generating tourist visits. Protected areas are generally tracts of land that are considered to be representative samples of a specific ecosystem, or tracts considered suitable for contributing to the preservation of certain types of wildlife.

It is difficult to determine the exact amount of land designated as protected areas in Saskatchewan due to the variation in methods of classification and their evolving nature. It is clear from the information review, although, that the south is generally more protected than the north. There are between four and five million hectares presently under some form of protection in Saskatchewan. Currently, less than 30% or roughly 1.2 million hectares of the total protected/managed areas in Saskatchewan are located in the NAD.² These numbers are subject to interpretation depending on international or provincial classifications which differ in their inclusion of certain protected area categories.

The International Union for the Conservation of Nature (IUCN) provides an internationally recognized system of categorizing protected natural and/or cultural lands and waters. The six IUCN categories are described in Table 2.1 (page 2-10) and their corresponding protected areas are presented in Exhibits 2.4 to 2.9 (pages 2-12 to 2-17). Table 2.2 (page 2-11) shows the types of protected areas that are recognized by the IUCN and are relevant to this product assessment. These include: ecological reserves, national historic sites, protected areas, provincial heritage property, provincial historic sites, provincial parks, recreation sites, and wildlife refuges.³

² This figure was estimated by totalling the land areas of #1-11 in Exhibit 2.10.

³ Information on specific sites within these categories or on the IUCN system can be found in the Protected Areas in Saskatchewan: A Statistical Report, SERM, 1993, or contact the Canadian Plains Research Centre, University of Regina.

Table 2.1 - IUCN Protected Area Categories

Classification	Description
IUCN I Strict Natural Reserve/Wilderness Area	Areas managed mainly for science: areas of land and/or sea possessing some outstanding or representative ecosystems, geological or physiological features and/or species, available primarily for scientific research and/or environmental monitoring.
IUCN II National Parks	Areas managed mainly for wilderness protection: large areas of unmodified land, or land and water, retaining their natural character and influences, without permanent or significant habitation, which are protected and managed so as to preserve their natural condition.
IUCN III Natural Monument	This category includes National Parks as well as some provincial managed lands (managed to National Park standards). These areas are managed mainly for ecosystem conservation and recreation: natural areas of land or sea, designated to: protect the ecological integrity for this and future generations, exclude exploitation or intensive occupation of the area, and provide a foundation for spiritual, scientific, educational, recreational and visitor opportunities, all of which must be environmentally and culturally compatible
IUCN IV Habitat/Species Management Areas	Protected areas managed mainly for conservation of specific natural features: areas containing one or more specific natural or natural/cultural features which are of outstanding or unique value because of their inherent rarity, representativeness or aesthetic qualities or cultural significance.
IUCN V Protected Land/Sea Scape	Protected areas managed mainly for conservation through management intervention: areas of land and/or sea subject to active intervention for management purposes so as to ensure the maintenance of habitats and/or to meet the requirements of specific species.
IUCN VI Managed Resource Protected Areas	Protected areas managed mainly for landscape/seascape conservation and recreation: areas of land, with coast and sea as appropriate, where the interaction of people and nature over time has produced an area of distinct character with significant aesthetic, cultural and/or ecological value, and often with high biological diversity. Safeguarding the integrity of this traditional interaction is vital to the protection, maintenance, and evolution of such an area.
	Protected areas managed mainly for the sustainable use of natural ecosystems: areas containing predominantly unmodified natural systems, managed to ensure long-term protection and maintenance of biological diversity, while at the same time providing a sustainable flow of natural products and services to meet community needs.

Table 2.2 - Relevant IUCN Product Types

Type	Description
Ecological Reserves	Provincial Crown lands which sustain or are associated with unique or representative parts of the natural environment.
National Historic Sites	Those places declared by the federal Minister of the Environment to be of national historic interest or significance. They may include either buildings or structures by reason of architectural design, or lands set aside in accordance with the National Parks Act to: <ol style="list-style-type: none"> 1. commemorate a historic event, or 2. preserve a historic landmark, or 3. preserve a historic (includes prehistoric) or scientific object of national importance
Protected Areas	Provincial Crown lands which offer maximum protection to important, rare, or fragile resources, either natural, historic, or archaeological.
Provincial Heritage Property	Any property, whether a work of nature or of man, that is of interest for its architectural, historical, cultural, environmental, aesthetic, or scientific value, including a site where architectural, historical, cultural, or scientific property may reasonably be expected to be found.
Provincial Historic Sites	Historic Sites serve to: <ol style="list-style-type: none"> 1. preserve and interpret historic or prehistoric resources representative of themes and events which have contributed to the history of Saskatchewan, and 2. provide opportunities for a variety of outdoor recreation activities that are largely dependent upon a historic setting.
Provincial Parks	Saskatchewan's park lands have a dual role: to preserve and protect selected natural and cultural resources for future generations, and to provide recreational, educational and interpretive opportunities for the people of Saskatchewan and visitors to the province.
Recreation Sites	Small parcels of provincial Crown lands developed to take advantage of particular recreational activities or facilities, such as a campground, picnic area or lake access point.
Wildlife Refuges	Areas for protection, propagation, perpetuation, management, control, regulation and/or enhancement of wildlife and its habitat.

Source: "Saskatchewan's Natural Heritage," 1998 Federal & Provincial Lands Classified by International Conservation Management Categories Poster, Canadian Plains Research Centre, University of Regina, 1998.

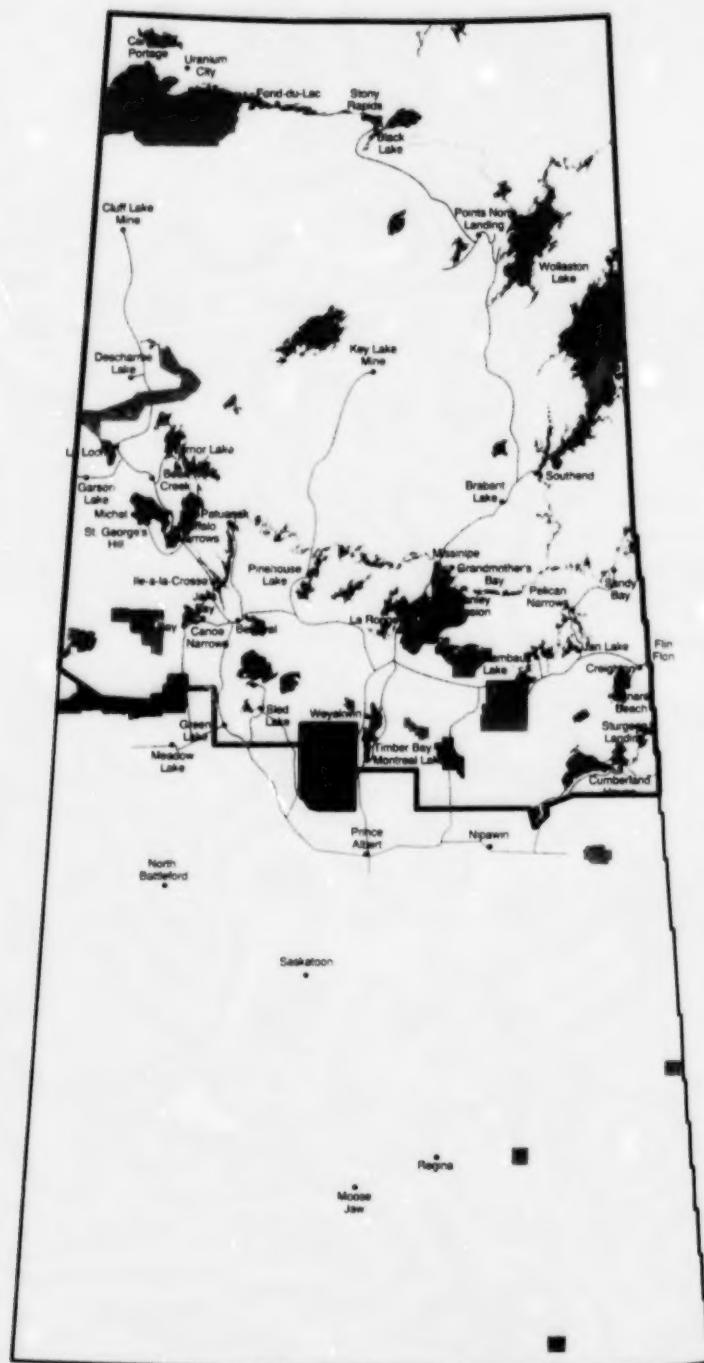


Exhibit 2.4 - IUCN I

■ Strict Natural Reserves/
Wilderness Area

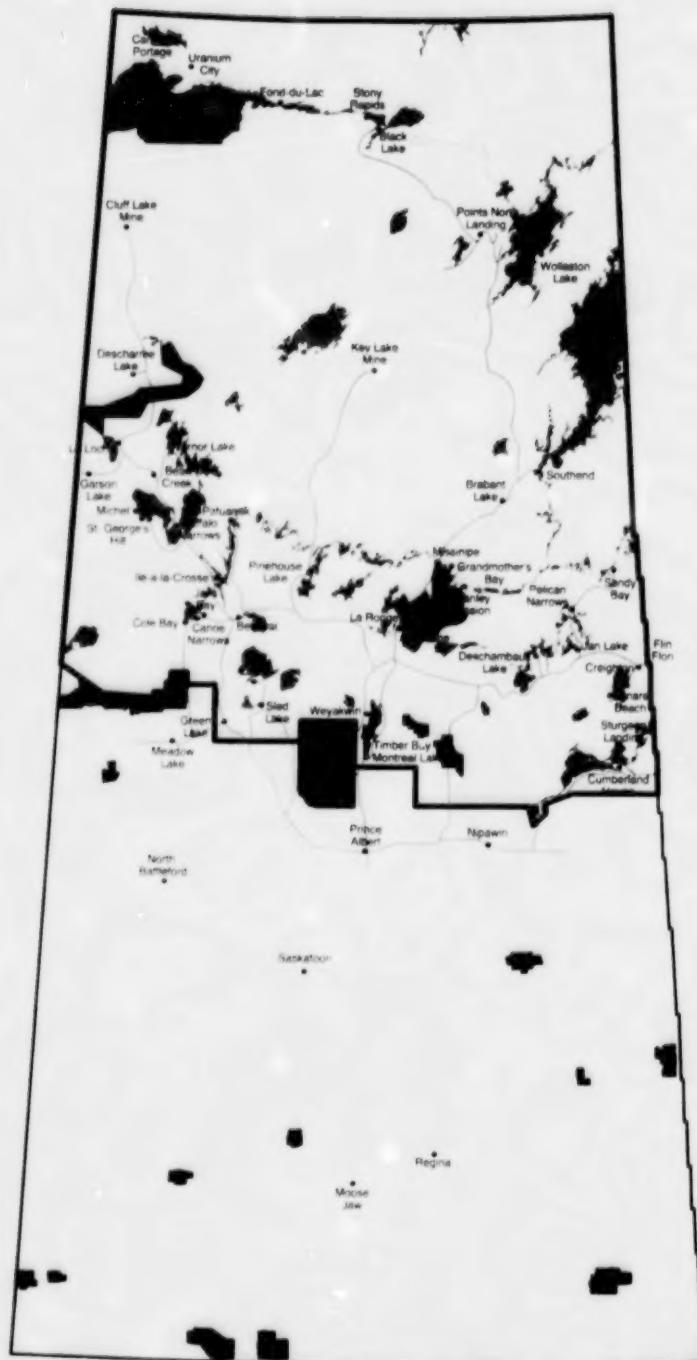


Exhibit 2.5 - IUCN II

National Park
(and Provincial Lands
managed to National
Park Standards)

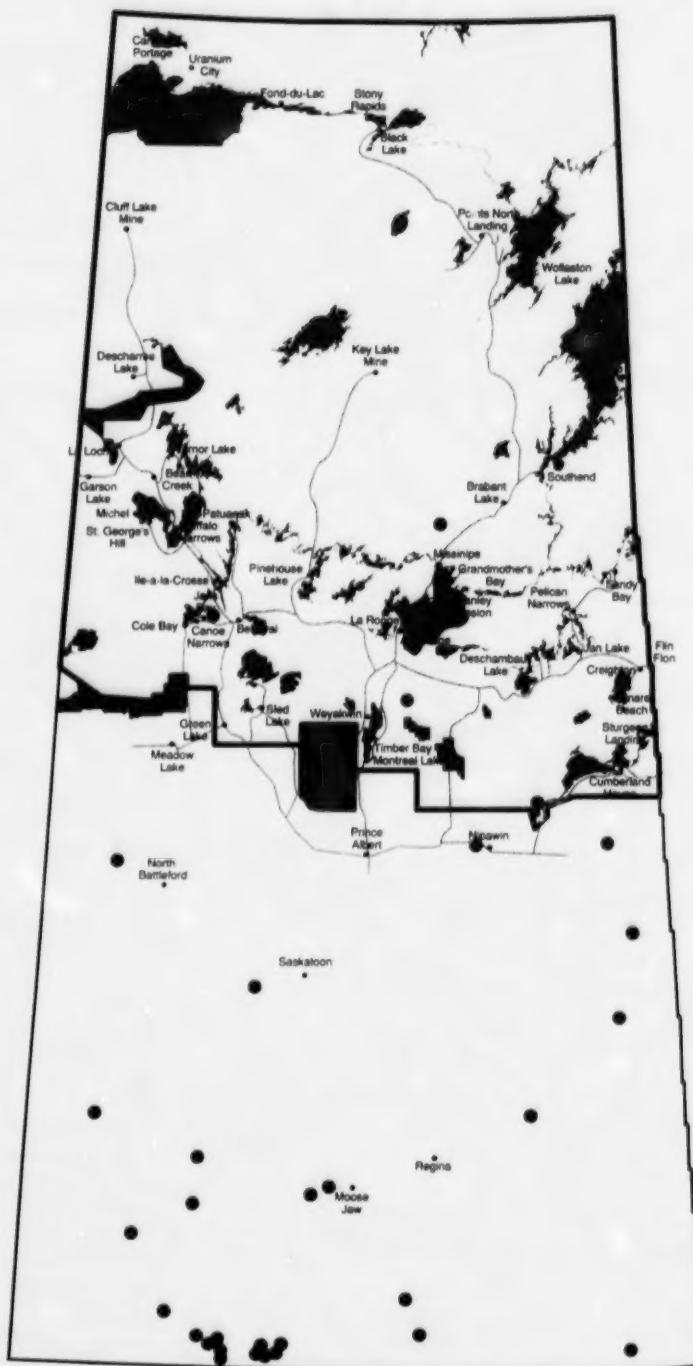
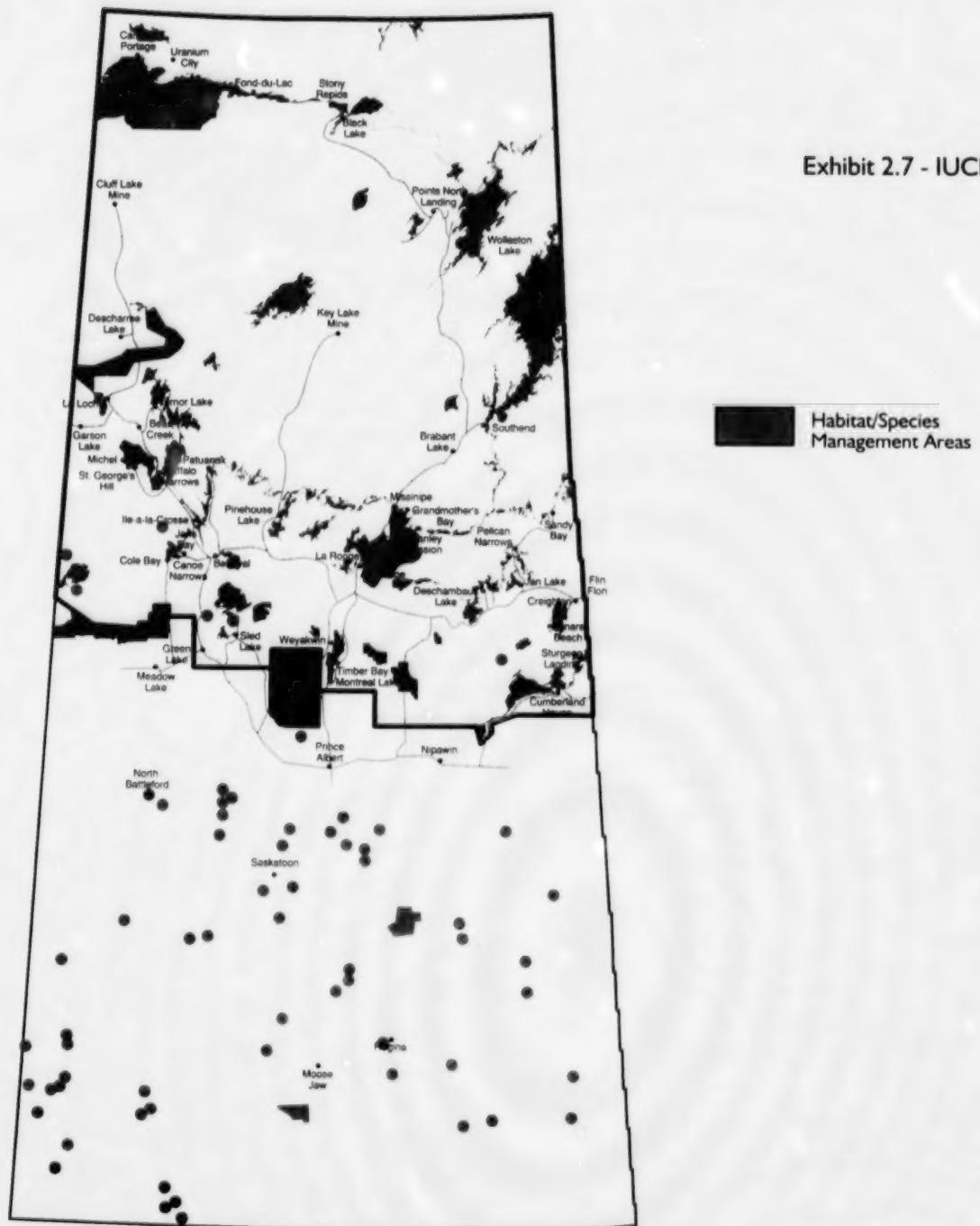


Exhibit 2.6 - IUCN III

Natural Monument



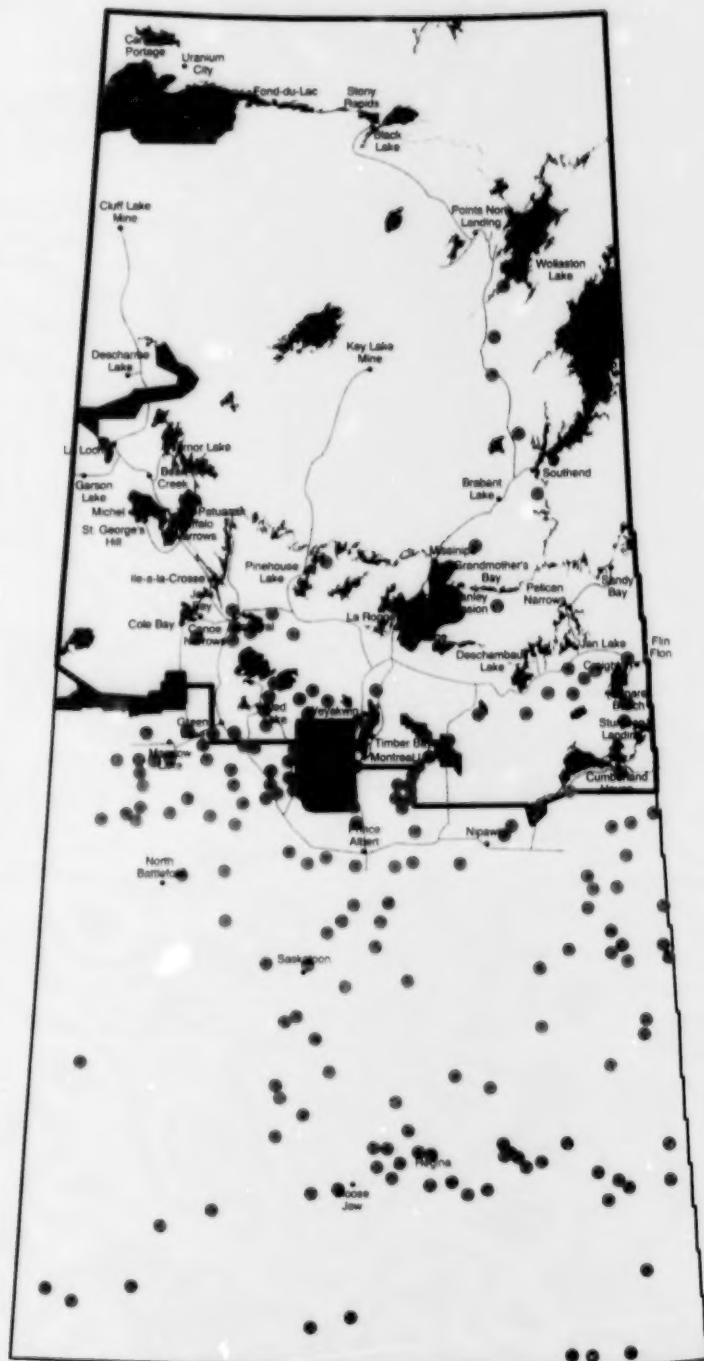


Exhibit 2.8 - IUCN V

Protected Land

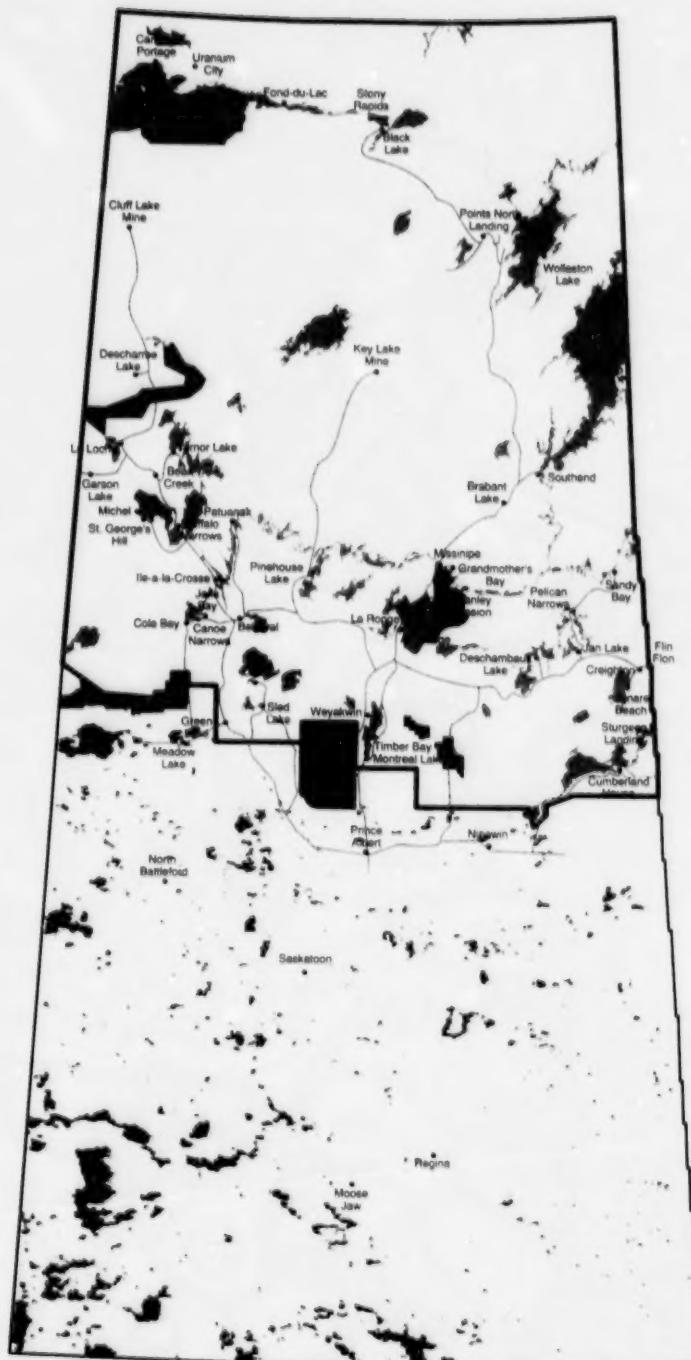


Exhibit 2.9 - IUCN VI

Managed Resource
Protected Areas

Currently in Saskatchewan, the designation of protected areas is included within SERM's Saskatchewan's Representative Areas Network. The network's goal is to have at least one very large (more than 100,000 hectares) and several smaller representative areas in each of Saskatchewan's eleven ecoregions, and will consist of existing and new wildlife lands, riparian areas, wetlands, protected areas, bird sanctuaries, ecological reserves and prairie rangelands. Although in some areas, activities and access may be limited, the designation of lands within the Network generally does not affect people's traditional uses of the land (i.e. recreational hunting, fishing, trapping or hiking). However, activities within them are carefully monitored in order to assess the overall effect on the environment.

Since August 1997, new initiatives have resulted in more than 1.6 million hectares of land being added to the network, including over 400,000 hectares in the north alone. These new areas are described in Table 2.3. A reproduction of the Network's March 1999 Progress Report's RAN map is provided in Exhibit 2.10 (page 2-19). The inventory provided may not necessarily be exhaustive. As the RAN program is ongoing and a complete inventory is still under construction by Saskatchewan Environment Resource Management (SERM), a current mapped inventory is not accessible.⁴

Table 2.3 - Recent Representative Areas Network Additions

New Area Designations	Approximate Location	Area
Two ecological reserves and one wildlife refuge	Cold Lake Air Weapons Range	170,783 hectares
Wapawekka Hills Representative Area	South of La Ronge	67,715 hectares
Seager Wheeler Lake Representative Area	South of Deschambault Lake	177,921 hectares

Several potential RAN sites, totalling more than one million hectares, are currently under public discussion in the Taiga Shield, Dore-Smoothstone, Cumberland Delta, and Amisk-Atik areas. Many additional sites in the NAD not yet under public discussion are being considered as well. SERM actively seeks feedback from local users and interest groups to finalize locations and determine acceptable activities within the sites. In addition, long-term management plans will be developed for each site within the Network.

⁴ For more detailed information on the RAN network, please consult the Saskatchewan Representative Areas Network - Final Action Plan, SERM, August 1997 or contact Nancy Cherney, Fish & Wildlife Branch, SERM at (306) 787-2796

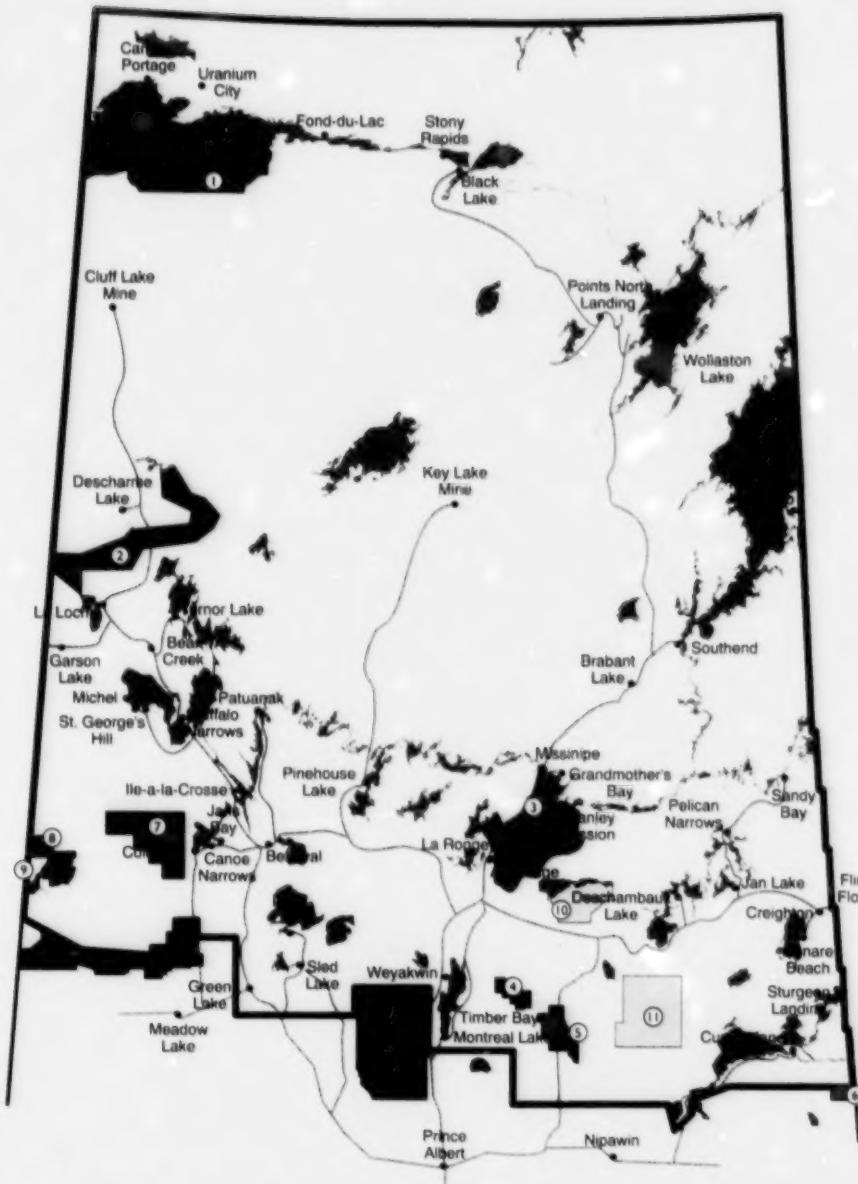


Exhibit 2.10 - Representative Areas Network

2.4.1.2 Wilderness Attractions

Wilderness attractions are represented by geographically-defined ecosystems that are unique and significant to the northern region. They range from general ecozones to more specific ecosites. These ecosystems together make up the 'north' and comprise the land formations, plants, and wildlife that serve as the core resources of tourism.

Ecozones

Using a process known as ecological land classification (ELC), Canada's natural landscapes have been divided into 15 terrestrial ecozones, which in turn have been divided into 150 ecoregions.⁵ Four of the 15 ecozones are found in Saskatchewan, three of which — Taiga Shield, the Boreal Shield, and the Boreal Plain — are found in the NAD. These ecozones are made up of the ecoregions shown in Table 2.4. A map of the ecoregions in northern Saskatchewan is provided in Exhibit 2.11 (page 2-21).

Table 2.4 - Ecozones and Ecoregions in the Northern Administration District

Ecozone	Ecoregion
Taiga Shield	Selwyn Lake Upland
	Tazin Lake Upland
Boreal Shield	Athabasca Plain
	Churchill River Upland
Boreal Plain	Mid-Boreal Upland
	Mid-Boreal Lowland

The three ecozones found in the NAD — the Taiga Shield, Boreal Shield, and Boreal Plain — are discussed in the following pages. Information for the discussion has been compiled from two of SERM's State of the Environment Reports: The Boreal Plain Ecozone (1995) and The Boreal Shield Ecozone (1999).

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State of the Environment Report: The Boreal Plain Ecozone, SERM, 1995.

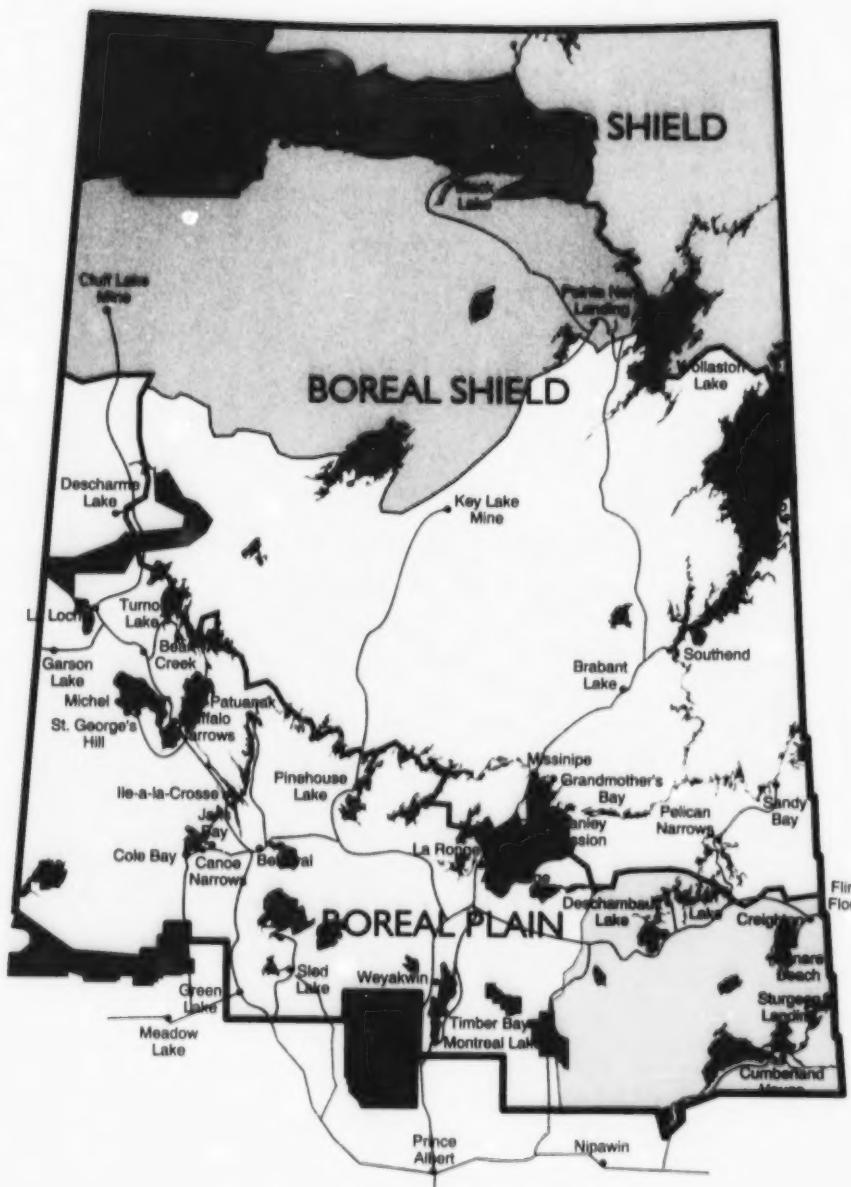


Exhibit 2.11 -
Ecozones & Ecoregions

Taiga Shield

At the northernmost edge of Saskatchewan, the Taiga Shield comprises rocky uplands, coniferous forests, arctic plants, and numerous lakes. Covering 7% of Saskatchewan, this zone is like a buffer between the boreal forest to the south and the tundra to the north. Dominant features of the Taiga Shield in Saskatchewan include the northern shores of Lake Athabasca, Fond du Lac River, and Wollaston Lake. Tree cover ranges from closed stands of tall spruce and jack pine in the Tazin Lake Upland to open, lichen-covered woodlands in the Selwyn Lake Upland.

The Taiga Shield is sparsely populated — it is home to three First Nations and four small communities. Common land uses include trapping, hunting, and fishing. Except for Rabbit Lake Mine which borders the Taiga Shield, no mines currently operate in the area and what little logging takes place is for local use. Electricity is generated in this region by the Wellington, Waterloo, White Lake, and Charlot river dams. Outside access to the Taiga Shield is limited to air travel and to a new winter road which extends south to Points North Landing and beyond.

Boreal Shield

The Boreal Shield extends from the south shore of Lake Athabasca to Amisk Lake near Creighton. Covering roughly 28% of Saskatchewan's territory, it is blanketed by coniferous forest and punctuated by hundreds of lakes and rivers. The province's five largest lakes — Athabasca, Cree, Reindeer, Wollaston, and Lac La Ronge — are all within, or border on, the Boreal Shield, as does most of the Churchill River System. The climate in the Boreal Shield ranges from long, cold winters to short, humid summers.

Most human settlement is limited to the northern and southern fringes of the Boreal Shield. Six First Nations are found here, as are 16 communities such as La Ronge, Pelican Narrows, Sandy Bay, and Creighton. Most communities in the Boreal Shield are accessible by road.

Industry in the area includes uranium, gold, and base metals mining, hydro-electric power generation, and, to a growing extent, forestry. Traditional land uses such as trapping, hunting, and fishing are also common. Most of Saskatchewan's fishing outfitters operate in the Boreal Shield.

Boreal Plain

The Boreal Plain ecozone comprises three ecoregions in Saskatchewan: the Mid-Boreal Upland, the Mid-Boreal Lowland, and the Boreal Transition zone. However, only the Mid-

Boreal Upland and Mid-Boreal Lowland occur in the NAD, which is the area of concern in this report. The Boreal Plain runs from the Alberta border north of Clearwater Provincial Park in a southeasterly direction through several major lakes to the Manitoba border south of Creighton.

The Boreal Plain is less rugged than the Boreal Shield and the Taiga Shield and it is covered with a mix of coniferous and deciduous forests. It is home to six First Nations, a substantial Métis population, and 23 small communities. Its forests and lakes support hunting, trapping, fishing, and relatively high levels of recreation compared to the ecoregions further north.

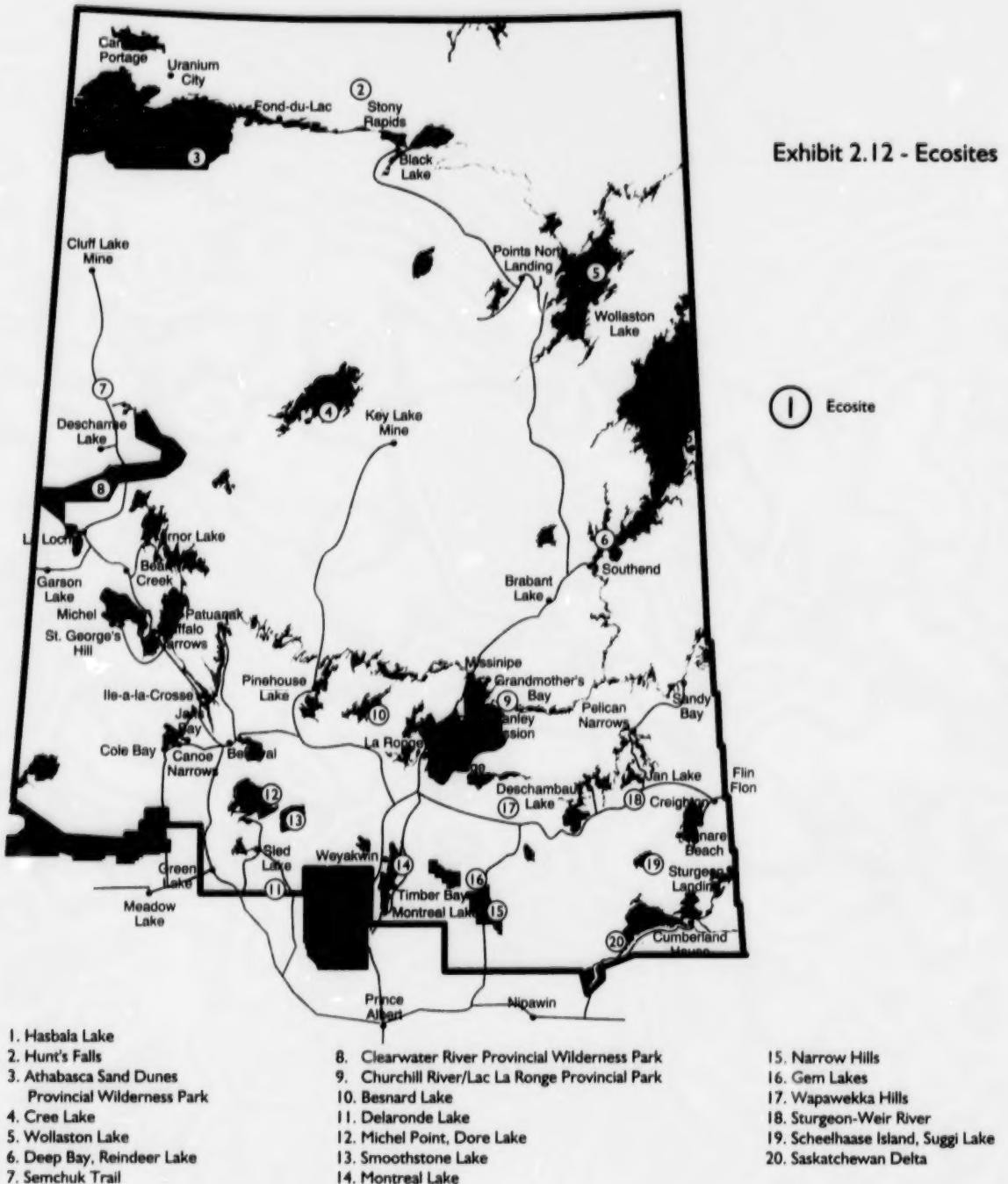
The Boreal Plain is the most accessible of the three northern ecozones. Several roads penetrate its forests and provide access to its communities and water bodies. Due to its accessibility and the quality of its timber, the Boreal Plain is home to most of Saskatchewan's forestry industry.

SERM's field operations are delivered through the departments' five administrative ecoregions. This division allows the department to decentralized activities such as licensing, resolving complaints, providing information, and enforcing regulations. Three ecoregions that exist in northern Saskatchewan are the Shield Ecoregion, West Boreal Ecoregion, and East Boreal Ecoregion. Information about these administrative boundaries can be found by contacting the appropriate ecoregion's head office. The contact information for these head offices can be found on page 2-49 of the Organizational Inventory (Section 2.5).

Ecosites

Ecotourism in Saskatchewan, Report I, State of Resource (Anderson/Fast & Associates, 1996) presents an inventory of 90 'ecosites' located in Saskatchewan. An 'ecosite' is a viewable representation of an ecosystem or any of its components. These sites were identified as representative of provincial natural sites with a high degree of significance. It is important to note that this inventory was representative and not exhaustive. Rather, it was designed to be used as a measuring stick by interested tourism stakeholders to assess the natural significance of their particular area or site.

Exhibit 2.12 (page 2-24) shows the location of 21 ecosites identified in the study that lie within the NAD. These sites are representative of a number of areas within the north considered to be highly unique from an ecological perspective.



2.4.1.3 Cultural Attractions

The northern region of Saskatchewan is rich in both history and Aboriginal heritage. This section discusses northern history, the north's unique culture, and a presentation of major historic sites. The role of culture as a product component is important. The cultural heritage of the north provides opportunities for product development in the following areas.

Northern History and Culture

Pre-contact

We do not know who the original inhabitants of northern Saskatchewan were, but present estimates date their arrival in the north at 6,000 to 8,000 years ago. Since that time, many peoples have migrated in and out of the region. For example, one group of plains-dwellers moved north between 4,500 and 4,000 years ago; a later group used the area between 2,500 and 2,000 years ago.

Today, the two major native peoples of the north are the Dene and the Cree. It is believed that the Dene have lived in northern Saskatchewan for roughly 2,500 years while the Cree moved into the area somewhere between 600 and 1,000 years ago. The Dene, who traditionally based their lifestyle on the caribou hunt, are established in the far northern reaches of the province. The woodland and swampy tribal groups of the Cree settled in the southern part of northern Saskatchewan.

Because little archaeological research has been done in the north and because the area is dominated by dense boreal forest, evidence of Aboriginal history and culture is currently not as plentiful as settlement-based cultures. However, archaeological sites such as camps, quarries, tool manufacturing areas, sacred places, and, notably, rock paintings have all been discovered in northern Saskatchewan. In addition, certain cultural traditions, such as the significance of elders in the safekeeping and teaching of oral history and the movement of goods via dog sleds, have survived.⁶

Explorers/Fur trade

Early English explorers and traders with the Hudson's Bay Company were based in York Factory, while early French explorers and traders came from Montreal via Great Lakes. There was considerable competition for furs which were transported on the major

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With assistance from Margaret Hanna, Curator, Aboriginal History Unit, Royal Saskatchewan Museum.

waterways to the Hudson Bay and the Great Lakes. In the NAD, this primarily occurred on the Churchill and North Saskatchewan Rivers.

The French were defeated in the 1760s and withdrew from western Canada, soon to be replaced by the North West Company. Competition was fierce until the Hudson's Bay Company united with the North West Company in 1823 and, aside from a number of independents, they traded in virtually a monopoly situation from that time.

Many forts and trading posts were established to protect and enhance each company's position in fur trading during this period, but few have survived the rigours of time. Some prominent sites were located on important fur trade routes such as Methye Portage and Frog Portage. At Methye Portage (from La Loche to the Clearwater River), both the Hudson's Bay Company and the Northwest Company maintained a set of posts and transport depots (ca. 1790-1886). Frog Portage was a vital fur trade route between the Sturgeon-Weir and Churchill Rivers and the site of several trading posts, including Fort du Traite (Independent, ca. 1774). Other prominent posts include the Hudson's Bay Company's Fairford House (ca. 1795) and North West Company's Fond du Lac (ca. 1805).

The Metis and "Half-Breeds"

A distinct culture was born by the union of the fur traders and the local Indian populations. The offspring of French and Indian parents and their descendants became known as the Metis, while those born of Indian and English or Scottish ancestry became known as half-breeds. The Metis and half-breeds were skilled in the fur trading business and often acted as the middlemen in the transactions between the fur companies and the native population. Descendants of both groups remain in northern Saskatchewan. The large Metis population in the western part of the north is evidenced by a unique language that is still in use called Mechif, a combination of French and Cree.

Northern Culture

Those living in northern Saskatchewan believe that they are part of a distinct culture that has developed because of their geography. The immense size of northern Saskatchewan combined with the low population has produced a largely independent group of people who have a unique relationship with the land. Tales from the trap line, from former 'bush pilots,' and others who live or have spent a considerable amount of time in the north, support this contention.

Historic Sites

Certain heritage resources in the NAD are officially recognized as significant by various levels of government. These areas include federal historic sites/markers, provincial historic parks, provincial protected areas, provincial historic sites/markers, and provincial/municipal heritage property and overlap somewhat with the discussion of protected areas in Section 2.4.1.1. The locations of these sites are presented in Exhibit 2.13 (page 2-28).

In addition to these provincially recognized sites, there are 'Sites of a Special Nature' that have been recorded and filed with the Heritage Branch. These sites, which mostly include aboriginal rock paintings and burials, are afforded special protection status under the Heritage Property Act and are generally considered sacred or spiritual by First Nations. It should be emphasized that a thorough inventory of cultural, historical, or archaeological sites in northern Saskatchewan is not currently available.

There are approximately 70 of these sites in northern Saskatchewan, in the category of rock paintings, that may have some potential for tourism development. None of these sites are currently developed for cultural tourism or visitation, with most in extremely remote areas, although some are often visited by canoeists and other outdoor enthusiasts. The opportunity and potential for tourism development of this type of heritage site would require consultation and planning with local First Nations.⁷ Some of the better-known sites in this category include the Churchill River pictographs, consisting of 19 aboriginal rock paintings found along the Churchill River in northern Saskatchewan. The known rock painting sites found in the NAD are represented in Exhibit 2.14 (page 2-29).

The Saskatchewan Heritage Branch, which maintains the official archaeological site files, has approximately 18,000 sites on record — less than a fifth of which likely exist in northern Saskatchewan.⁸ Exhibit 2.15 (page 2-30) provides a general representation of the total number of archaeological sites on record with the Saskatchewan Heritage Branch.

2.4.2 Flora and Fauna

Northern Saskatchewan's abundant vegetation and wildlife are significant aspects of the northern experience, providing both consumptive and non-consumptive tourism. These two aspects are presented in the following discussion of wildlife, plants and species at risk, and fishing and hunting outfitters.

⁷ Saskatchewan Municipal Affairs, Culture & Housing, Archaeological Resource Management

⁸ Ibid.



Exhibit 2.13 -
Historic Sites

MUSEUMS

1. Mistasinihk Place Interpretive Centre
2. Northern Gateway Museum
3. Frazer's Museum

PROVINCIAL HISTORIC PARKS & SITES

4. Cumberland House Provincial Historic Park
5. Holy Trinity Anglican Church Site

MUNICIPAL HERITAGE PROPERTIES

6. Roman Catholic Rectory

PROVINCIAL MARKERS

7. Joseph Burr Tyrrell
8. Green Lake Fur Trade
9. St. John The Baptist Mission
10. Beaver City
11. Hanson Lake Pond
12. Peter Pond's Post
13. Henry Frobisher Post

FEDERAL HISTORIC SITES/MARKERS

5. Holy Trinity Anglican Church Site
14. Frog Portage
15. Ille-a-la-Crosse
16. Methye Portage
17. Cumberland House

PROVINCIAL HERITAGE PROPERTIES

5. Holy Trinity Anglican Church Site

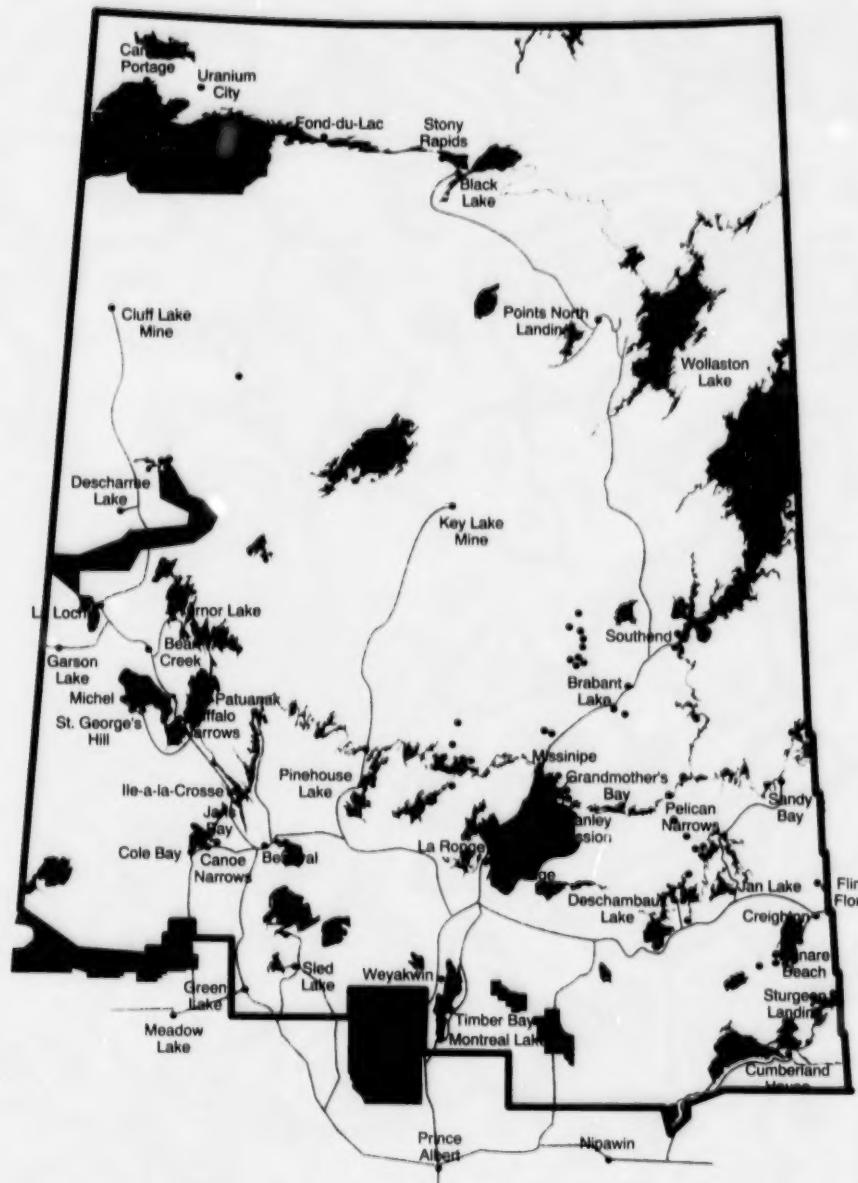


Exhibit 2.14 -
Rock Art Sites

Rock Art Sites

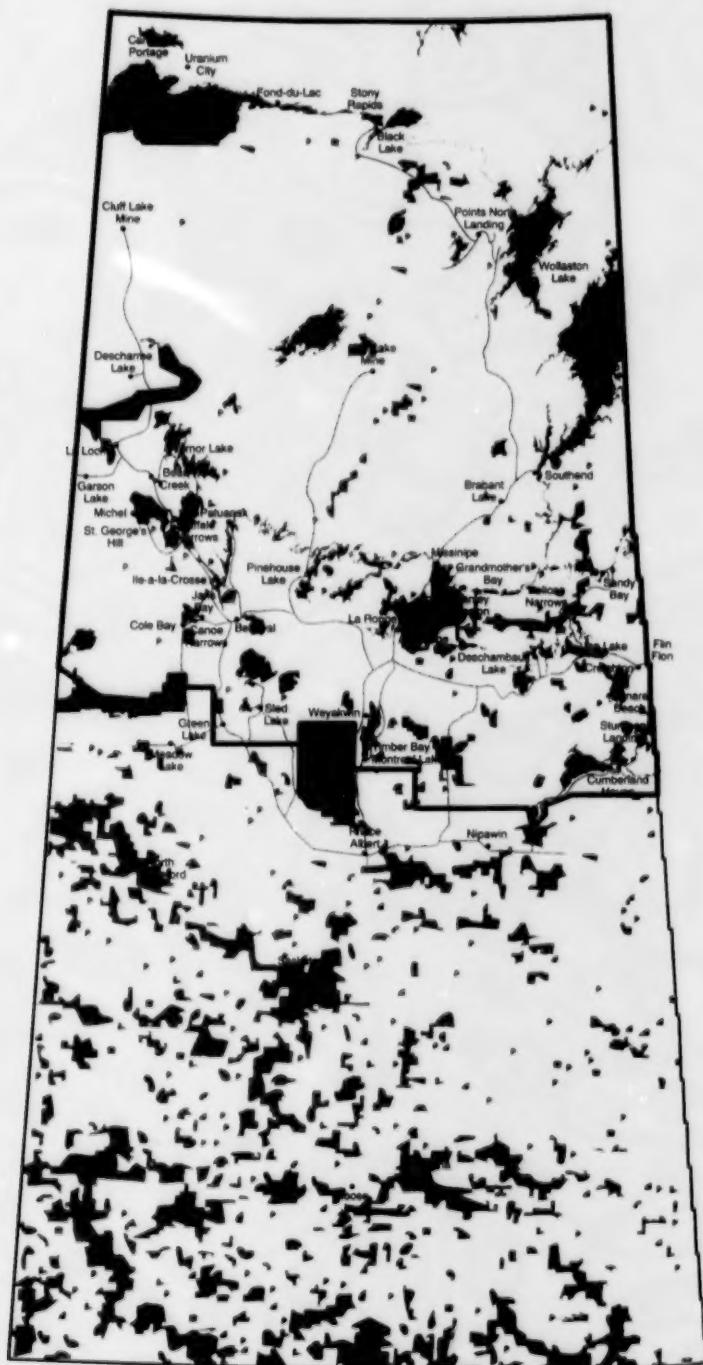


Exhibit 2.15 - Archaeological Sites

Archaeological Sites

Source: Saskatchewan Heritage Branch,
Department of Municipal
Government

2.4.2.1 Wildlife, Plants and Species at Risk

The following discussion of wildlife, plants and species at risk in the NAD includes information from both SERM's Saskatchewan Integrated Resource Management Plan, Part B: Supporting Material and the Committee on the Status of Endangered Wildlife in Canada (COSEWIC), 1999 Listings.

Wildlife

In general, wildlife populations in northern Saskatchewan are relatively abundant. Because of this, the wildlife supports a number of human activities, including subsistence hunting and trapping, sport fishing and hunting, commercial harvesting, and nature-based tourism. The diversity and abundance of wildlife in the north varies widely between the ecozones described in Section 2.4.1.2. For example, wildlife diversity ranges from low in the Selwyn Lake Upland region of the Taiga Shield to high in the Boreal Plain further south. This section provides a brief description of characteristic mammals, birds, and fish in northern Saskatchewan.

Mammals

There is considerable diversity of mammals in northern Saskatchewan — over 50 species are found here. Ungulates include white-tailed deer, mule deer, elk, moose, and woodland and barren-ground caribou. Black bear, grey wolf, red fox, arctic fox, lynx, bobcat, and wolverine are among the larger carnivores. Numerous smaller mammals, including but not limited to beaver, muskrat, mink, marten, fisher, snowshoe hare, red squirrel, and several species of bats and mice are common.

Considerable human activity relies on the north's mammals. Subsistence and commercial hunting and trapping depend heavily on healthy populations of several species. Most populations are considered to be stable, although certain species such as wolverine are relatively uncommon.⁹ Other human activities such as forestry have an impact on mammal populations. For example, the southern limit of the woodland caribou's range has receded north as logging activity has expanded up from the south.

Birds

Over 250 species of birds are found in northern Saskatchewan. The diversity ranges from high in the Mid-Boreal Lowland to relatively low on the Athabasca Plain. Characteristic

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State of the Environment Report: The Boreal Shield Ecozone, SERM, 1999.

species range in the Taiga Shield include arctic and red-throated loons, northern phalarope, and northern shrike. In the Boreal Shield ecozone, 218 species have been recorded. Birds common to both the Boreal Shield and the more southerly Boreal Plain include the great-horned owl, blue jay, evening grosbeak, boreal chickadee, and white-throated sparrow, among many others.

Considerable numbers of ducks and geese use the waters of the north as stopovers or as summer breeding areas. Due to the small population and limited access, hunting pressure on waterfowl is relatively low compared to other parts of the province. Other game birds include spruce, ruffed, and sharp-tailed grouse, ptarmigan, and Hungarian partridge.

Northern Saskatchewan is also home to several large species of birds which are sensitive to human activity. Among these are bald eagle, golden eagle, common loon, double breasted cormorant, and white pelican. In fact, Saskatchewan's largest breeding colonies of pelicans and cormorants occur in the north.

Fish

Several species of game fish are abundant in northern Saskatchewan. Native species such as walleye, northern pike, lake whitefish, yellow perch, and lake trout are common, while arctic grayling are found from the Churchill River Upland north. Burbot, sauger, and lake sturgeon are also found in certain areas. Non-native species, including brook, brown, and rainbow trout, splake, and smallmouth bass are stocked in several waterbodies in the Boreal Plain and Boreal Shield ecozones. Numerous species of non-game fish, such as redhorse, cisco, lake chub, and spotted shiner, are found in northern waters.

Due largely to inaccessibility to most fishermen, angling pressure in most areas of the north is relatively light compared to southern regions of Saskatchewan. However, 11 of the 50 most heavily fished lakes in the province are in the Boreal Shield. This is due to the fact that the region is considered a highly desirable destination for trophy fishing. Anglers come to the Boreal Shield from across Saskatchewan, as well as from many other parts of Canada, the United States, and beyond.

Wildlife at Risk

The further north one goes in Saskatchewan, the less the province is developed. As a result, human impact on the flora and fauna of the north has been low compared to southern and central Saskatchewan. However, several wildlife species are considered to be at risk and pressure is expected to grow on other species as industries such as forestry expand northward. Table 2.5 presents the list of species currently considered to be at risk in

northern Saskatchewan.

Woodland caribou and wolverines are highly susceptible to changes in their environment, particularly forestry. Wolverine populations, which are inherently low in density, are now considered to be vulnerable due to their increasing contact with human activities. Other species at risk in the north are also imperiled elsewhere. For example, the northern leopard frog population in Saskatchewan is considered to be susceptible to a worldwide decline in amphibian populations. There has been one significant recent improvement in a species' population. As a result, as of April, 1999, the Caspian Tern has been removed from the list of species at risk.

Table 2.5 - Wildlife at Risk in Northern Saskatchewan

Threatened Category - Species likely to become endangered if limiting factors are not reversed.	
Fish	Shortjaw cisco
	Deepwater sculpin
Vulnerable Category - Species of special concern because of characteristics that make it particularly sensitive to human activities or natural events.	
Mammals	Woodland caribou
	Wolverine
Birds	Caspian Tern
Amphibians	Northern leopard frog
Lepidoptera (butterflies and moths)	Monarch butterfly

Source: Committee on the Status of Endangered Wildlife in Canada, 1999 Listings.

Plants

No comprehensive survey of plant life in northern Saskatchewan has ever been undertaken. Because of this, a precise number of plant species in the north is not known. However, several studies on rare and endangered plant life have taken place and counts of rare and vulnerable species in certain ecozones have occurred.¹⁰ Notable studies have been performed by the W.P. Fraser Herbarium, University of Saskatchewan, Saskatchewan Conservation Data Centre (SCDC), Saskatchewan Environment and Resource Management (SERM). As of 1995, a total of 106 rare plant species had been identified in the Boreal Plain

¹⁰

State of the Environment Report: The Boreal Plain Ecozone, SERM, 1995.

Ecozone (SCDC), a summary of which appears in Table 2.6.

The Boreal Shield Ecozone has relatively few species listed as being at risk by COSEWIC. This is largely because less than 1% of Saskatchewan's population lives in the Boreal Shield and development in the area is limited. However, the Athabasca Sand Dunes in the northwest portion of this ecozone are home to two species of plants, the Athabasca Thrift (*Armeria maritima* ssp. *interior*) and Tyrell's Willow (*Salix planifolia* ssp. *tyrellii*), which are listed as threatened. In addition, eight other species found only in the Athabasca Sand Dunes are highly susceptible to human disturbance. They are now offered some protection by the establishment of Athabasca Sand Dunes Provincial Wilderness Park.¹¹

The Taiga Shield is the least inhabited and least developed of all ecozones in Saskatchewan. Because of this, the flora of the area is, for the most part, undisturbed. However, much research on the plant life of the region remains to be done. SERM is currently developing the State of the Environment Report: The Taiga Shield Ecozone, which is due to be released in 2001. This study will look into rare and unique plant species, among other topics.

Table 2.6 - Rare Plant Species within the Boreal Plain Ecozone

Category Species	Examples of Plant Species	Total Number of Species
Critically Imperilled (less than 5 known occurrences)	Swamp Pink; Ram's Head Lady's Slipper	28
Imperilled (between 6 and 20 known occurrences)	Divided Cinquefoil; Large-Flowered Ground Cherry	5
Imperilled/Rare (between 6 and 100 known occurrences)	Smooth Wild Rye; Hairy Butterwort	15
Rare (between 20 and 100 known occurrences)	Musk Root; Red Manzanita	10
Rare/Widespread (between 20 and over 100 known occurrences)	Blunt-Fruited Sweet Cicely; Wood Lily	2
Unranked (i.e. they have not been ranked yet)	Giant Solomon's Seal; Arctic Bentgrass; Beck Water Marigold	46
Total		106

Source: Saskatchewan Conservation Data Centre, 1995.

¹¹

State of the Environment Report: The Boreal Shield Ecozone, SERM, 1999.

2.4.2.2 Fishing and Hunting Outfitters

Fishing and hunting outfitters rent equipment, offer guide services, and/or provide accommodations to both residents and non-residents for the purposes of fishing, hunting, and/or other recreational activities.¹² In addition to base camps, many outfitters provide 'outposts' or day camps in surrounding areas that have more limited facilities. Most outfitters provide guided and non-guided multi-day package plans, such as the all-inclusive American Plan. Services may include accommodation (base camp or local facilities), transportation, meals, guide service, skinning, freezing, and filleting service, and the supply of boats, equipment and fuel. In addition to fishing and hunting outfitting, some camps have broadened their offering to include canoeing, hiking, and other non-consumptive activities.

Fishing appears to be the primary outfitting attraction offered in the north. Many fishing outfitters also offer hunting experiences while few northern outfitters offer hunting exclusively. Many areas in the north are remote with limited access, deterring many people from travelling to these locations for hunting purposes alone. Although some outfitting camps are road accessible, the northern region has the highest concentration of fly-in fishing camps in the world.¹³ Many of these remote camps are accessible only by air and provide lakes that are less heavily fished. Camps of this type attract clients, often American, based on the unique resources they can provide.

It is difficult to provide an accurate and complete list of outfitters in northern Saskatchewan. There are several sources which are either not exhaustive or do not provide a readily accessible inventory. Tourism Saskatchewan's 1999 Fishing & Hunting Guide lists 109 outfitters in the NAD who pay a fee to be included in the Guide. The Saskatchewan Outfitters Association has approximately 260 members of which it estimates at least 50% are located in or near the NAD. In addition, the 1998 Northern Saskatchewan Business Directory, produced by Saskatchewan Northern Affairs, lists 172 outfitters in the NAD. Finally, SERM, who licences Saskatchewan outfitters, maintains a database of approximately 255 northern outfitters.

By combining accessible sources and including additions from NSTTT committee members, a listing of northern outfitters has been prepared for the purposes of this report (pages 2-36 and 2-37). In addition, Exhibit 2.16 (page 2-38) shows outfitting locations in the NAD. It should be emphasized that the listing and exhibit are only representative due to the challenges associated with accessing data.

¹² 1999 Fishing & Hunting Guide, Tourism Saskatchewan

¹³ Ibid.

Northern Saskatchewan Outfitters

- ▶ A and C Lodge
- ▶ Aerial Adventures (1997) Ltd.
- ▶ Alstead Lake Wilderness Outfitters
- ▶ Angell's Resort
- ▶ Angler Rapids Wilderness Lodge
- ▶ Anglers Trail Resort
- ▶ Arctic Lodges Ltd.
- ▶ Athabasca Store
- ▶ Athabasca Camps Inc.
- ▶ Athabasca Lone Wolf Camps
- ▶ B & L Cabins and Outfitters
- ▶ Bait Master Hunting Camps
- ▶ Bay Resort
- ▶ Bayview Lodge
- ▶ Bear Track Camps
- ▶ Bear's Camp
- ▶ Beaver Lodge Fly-Inn Ltd.
- ▶ Besnard Lake Lodge
- ▶ Beyond La Ronge Lodge
- ▶ BFJ Lodge
- ▶ Big Eddy Camp
- ▶ Big Sandy Resort
- ▶ Black Bear Island Lake Lodge
- ▶ Bloomfield's Ballantyne Bay Resort
- ▶ Bolton Lake Wilderness Resort
- ▶ Boreal Camp Services/Outfitting Ltd.
- ▶ BSH Fish Camp Ltd.
- ▶ Buck & Bear Wilderness Adventures
- ▶ Camp Grayling
- ▶ Camp Kinisoo (1976) Ltd.
- ▶ Campbell Lake Lodge
- ▶ Camseall Portage Eagle Lodge
- ▶ Can-Am Outfitters Ltd.
- ▶ Canadian Wilderness
- ▶ Careen Lake Lodge
- ▶ Caribou Creek Lodge Ltd.
- ▶ Carriere's Camp
- ▶ Cartier Lodge
- ▶ Cheemo Lodge
- ▶ Churchill River Leisure Lodge
- ▶ Churchill River Voyageur Lodge
- ▶ Churchill River Wilderness Camps
- ▶ Clarke Lake Lodge
- ▶ Clarke's Northern Outfitters
- ▶ Clearwater Raft Tours Ltd.
- ▶ Close Lake Camps
- ▶ Collins Camps and Outfitting
- ▶ Complex Lake Lodge
- ▶ Conacher Camps
- ▶ Contact Wilderness Ltd.
- ▶ Cornhusker Fishing Camp
- ▶ Cree Lake Resort
- ▶ Cree River Lodge
- ▶ Crystal Lodge
- ▶ Cuelenaere Lake Lodge
- ▶ Cumberland Delta Outfitters
- ▶ Cumberland House Outfitters Ltd.
- ▶ Cup Lake Adventures
- ▶ D and D Camps Ltd.
- ▶ Darsana Lodge
- ▶ Davin Lake Lodge
- ▶ Deception Lake Lodge
- ▶ Deerhorn Lodge
- ▶ Delaronde Resort
- ▶ Delta Bay Outfitters
- ▶ Deschambault Lake Resort
- ▶ Dillon Lake Outfitting
- ▶ Dobbin Lake Lodges
- ▶ Dore Lake Lodge
- ▶ Eagle Lodge Ltd.
- ▶ Ena Lake Lodge
- ▶ English River First Nations Resort
- ▶ Far North Wilderness Outfitters
- ▶ Ferguson Outdoor Enterprises
- ▶ Fish Hook Lodge
- ▶ Flatlands Hunting and Fishing Camps
- ▶ Flin Flon Outfitters Ltd.
- ▶ Foggy Mountain Outfitters Ltd.
- ▶ Forrest Lake Outfitters
- ▶ Foster Lake Lodge
- ▶ Foster River Camp
- ▶ Gary Simon Outfitting
- ▶ Golden Eagle Outfitters
- ▶ Grand Slam Lodge
- ▶ Grayling Lodge
- ▶ Great North Lodge
- ▶ Green Lake Lodge
- ▶ Grey Owl Camp Fly-In Ltd.
- ▶ Hanson Lake Cabins
- ▶ Hasbala Lake Lodge
- ▶ Hatchet Lake Lodge
- ▶ Hawkrock Wilderness Adventures
- ▶ Hepburn Lake Lodge
- ▶ Herman Outfitting Camp
- ▶ Hilliard's Pine Island Camp
- ▶ Hopp's Camps
- ▶ Horizons Unlimited/Churchill River Canoe Outfitters
- ▶ Indian Head Camps
- ▶ Iskwatikan Lake Lodge
- ▶ Island Falls Enterprises Ltd.
- ▶ Jackson's Lodge
- ▶ Jan Lake Lodge
- ▶ Jim's Camp - Nistowiak Falls
- ▶ Joe Favel Outfitting
- ▶ John Fonos Outfitting
- ▶ Johnson River Camp
- ▶ Johnson's Resort & Outfitters
- ▶ Josdal Camps
- ▶ Kamkota Lodge
- ▶ Katche Kamp Outfitters
- ▶ Kee Kamps Ltd.
- ▶ Keefe Lake Fishing Camp
- ▶ Keeley Lake Lodge
- ▶ Keighley's Camps
- ▶ Kelly's Wilderness and Outfitting
- ▶ Kenro Fish Camp
- ▶ Kenyon Lake Fly-in
- ▶ Kingfisher Lodge
- ▶ Koo-Sto Wilderness Fishing
- ▶ La Ronge Eagle Point Resort Ltd.
- ▶ LaFleur Outfitting
- ▶ Lakers Unlimited
- ▶ Larocque Lake Lodge
- ▶ Lawrence Bay Lodge & Airways
- ▶ Legends Outfitting Ltd./Frontier Cabins

Northern Saskatchewan Outfitters (continued)

- ▶ Lindbergh's Reindeer Lake Lodge
- ▶ Lindwood Lodge
- ▶ Little Bear Lake Resort
- ▶ Lloyd Lake Lodge
- ▶ Long's 4 Seasons Resort Ltd.
- ▶ Lost River Outfitters
- ▶ MacDonald Bay
- ▶ Macoun Lake Island Lodge
- ▶ MacPherson Lake Lodge
- ▶ Mariache Lake
- ▶ Martin's Cabins
- ▶ Martineau River Outfitters
- ▶ Mawdsley Lake Lodge
- ▶ McTavish Lake Lodge
- ▶ Medicine Rapids Resort
- ▶ Medora Camps
- ▶ Mercer Outfitting
- ▶ Michel Lodge
- ▶ Ministikwan Lodge
- ▶ Minor Bay Camps Ltd.
- ▶ Misaw Lake Lodge
- ▶ Miskat Lake Outfitters
- ▶ Mista-Nasayew Outfitters
- ▶ Mistik Lodge
- ▶ Moose Horn Lodge
- ▶ Munro Lake Camp
- ▶ Murray's Camp
- ▶ Mystic Magic Wilderness Camp
- ▶ Nagle Lake Outfitters
- ▶ New Highrock Lodge Ltd.
- ▶ Newmart Fishing Resort
- ▶ Niska Hunting and Fishing Camp
- ▶ Nordic Lodge
- ▶ North Country Fishing Camps
- ▶ North Escape Lodge
- ▶ North Haven Lodge
- ▶ Northern Echo Lodge
- ▶ Northern Field & Stream Outfitters
- ▶ Northern Lights Lodge
- ▶ Northern Nights Outfitters
- ▶ Northern Reflection Lodge
- ▶ Oliver Lake Wilderness Camp
- ▶ Overland Crosscountry Ldoge
- ▶ Pardoe Lake Lodge
- ▶ Patterson Camps
- ▶ Paull River Wilderness Camp
- ▶ Pawistik Lodge
- ▶ Pelican Narrows U-Fly-In Ltd.
- ▶ Phelps Lake Camp
- ▶ Pickeral Bay Cabins Ltd.
- ▶ Pike Island Lodge & Outposts
- ▶ Pilot's Lodge
- ▶ Pine Grove Resort
- ▶ Pine Point Lodge
- ▶ Pink Lake Lodge
- ▶ Pipestone Lake Lodge Ltd.
- ▶ Plaistend's Camp
- ▶ Pointer Lake Lodge (Fly-In)
- ▶ Points Unknown
- ▶ Poplar Point Resort
- ▶ R & R Wilderness Lodge
- ▶ Rainbow Lodge
- ▶ Rainbow Ridge Lodge B & B
- ▶ Red's Camps
- ▶ Reindeer Lake Lodge
- ▶ Reindeer Lake Trout Camp
- ▶ Reindeer River Camp
- ▶ Riese's Canadian Lake
- ▶ Riverside Lodge
- ▶ Russell's Churchill River Camps
- ▶ Sarge's Grayson Lake Camp
- ▶ Scott Lake Lodge
- ▶ Scotty's Fly Inn
- ▶ Screaming Eagle Outfitting
- ▶ Selwyn Lake Lodge
- ▶ Shadd Lake Cabins
- ▶ Silence of the North
- ▶ Sisip (Duck) Outfitting Camp
- ▶ Slim's Cabins
- ▶ Smoothstone Lake Lodge
- ▶ South Bay Cabins
- ▶ Sportsman's Lodge
- ▶ Stock Man's Lodge
- ▶ Stop the Clock Fishing Inc.
- ▶ Sturgeon Landing Outfitters
- ▶ T & D Amisk Cabins
- ▶ Tamarack Lodge
- ▶ Tate Island Fishing Lodge
- ▶ Tazin Lake Lodge
- ▶ The New Canoe West Resort
- ▶ Thompson Lake Lodge
- ▶ Thompson's Camps Inc.
- ▶ Three Lakes Camp
- ▶ Thunder Hills Outfitting
- ▶ Thunder Mountain Outfitting
- ▶ Thunderbird Camps
- ▶ Tower Lodge
- ▶ Trail North Fishing Camp
- ▶ Triveet Lake Fly-In
- ▶ True North Lodge Ltd.
- ▶ Twin Bay Resort Ltd.
- ▶ Twin Lake Fly-In
- ▶ Two Fingers Fishing Camp
- ▶ Vermillion Lake Camp
- ▶ W J Wilderness Bear Camp
- ▶ Wadin Bay Resort
- ▶ Wheeler River Lodge Ltd.
- ▶ White Gull River Outfitters
- ▶ White Swan Lake Resort
- ▶ Wilson's Lodge
- ▶ Wollaston Lake Lodge Ltd.
- ▶ Wolverman Wilderness Outfitters

Note: SERM is not authorized to release the addresses of those outfitters whose licenses are issued in an individual's name.

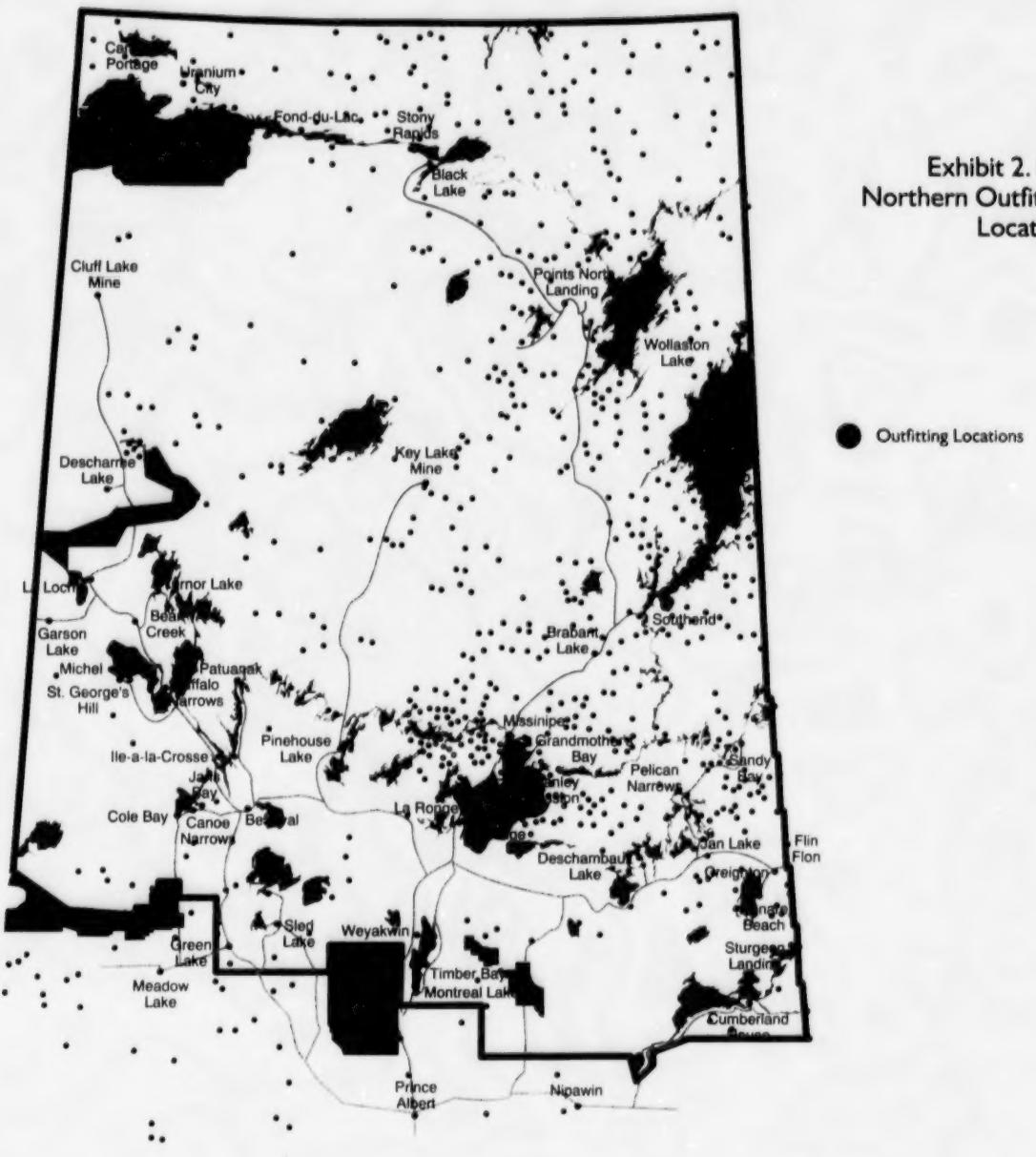


Exhibit 2.16 -
Northern Outfitting
Locations

Source: 1998 fish outfitters GIS dataset.
SERM, Information Management Branch

2.4.3 Events

The hosting of events contributes to the ability to generate tourist visits, and also contributes to the overall experience or opportunities for the tourist. As a general rule, events usually attract 80% to 90% of their participants from the local or regional community, while 10% to 20% are made up of tourists. A key point regarding the importance of events is that they provide the base from which specific tourist programs can be developed.

Exhibit 2.17 (page 2-40) displays a number of events included in the March 1999 Saskatchewan Events Guide, as well as those identified by NSTT committee members. These events range from the Chilly Willy Winter Festival held in March in Creighton, which includes a range of sporting events and entertainment, to the Beautiful Valley Jamboree held in July in Beauval, which includes a ball tournament, dances and jigging contests, as well as an outdoor music festival featuring Métis & native artists.

In addition to the events listed in the Guide, events such as 'Free Fishing Weekend' and 'Canada Day Celebrations' are held jointly across certain provincial parks in the NAD. Aside from tourism-specific events, a number of annual business meetings/events also contribute to the economic and social development of nearby communities.

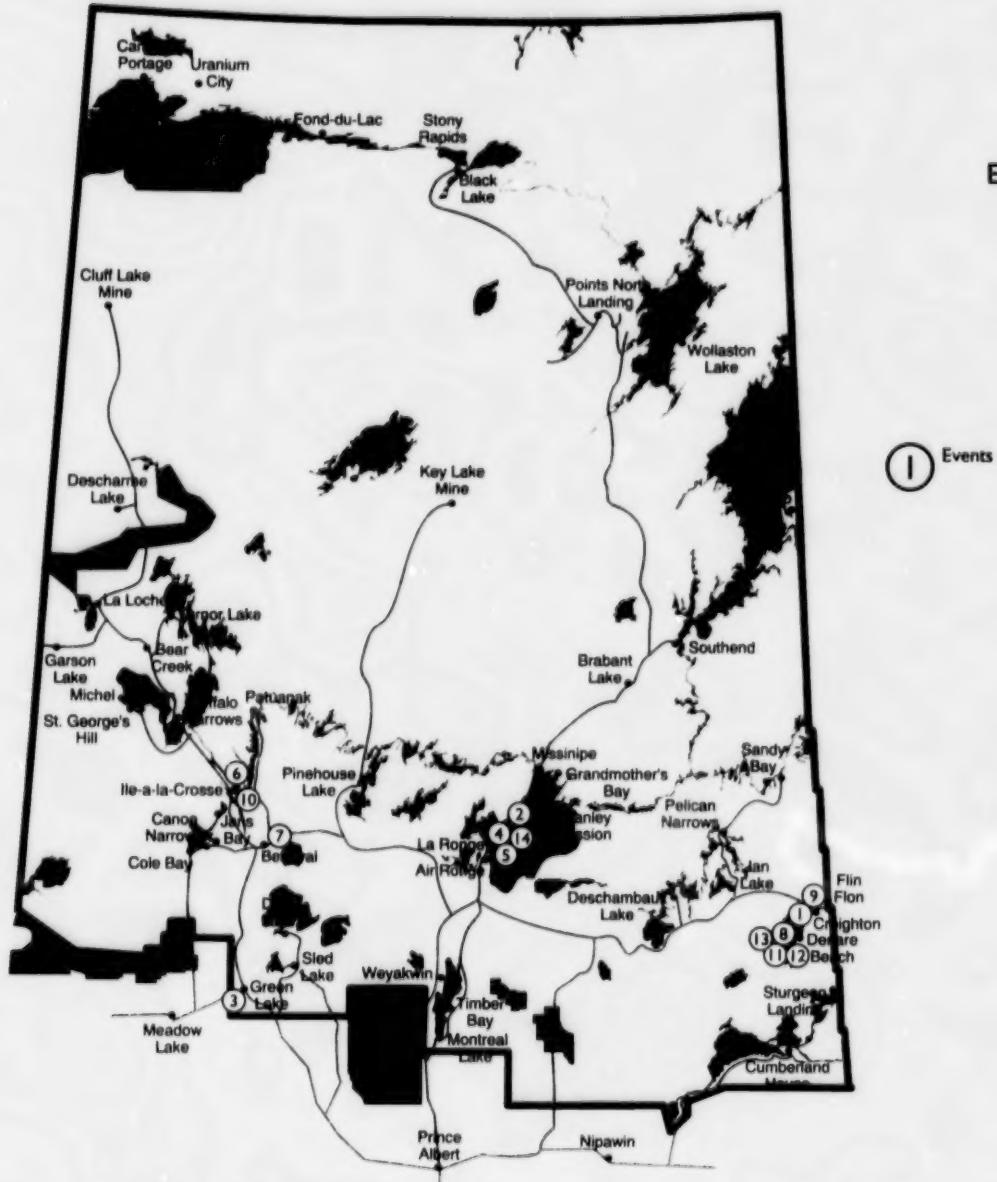
Exhibit 2.17 is certainly not exhaustive. Most communities have some type of festival, and there are many summer and winter fish derbies throughout northern Saskatchewan. For example, the Athabasca region has an Annual Winter Festival running from the last week in February until the first week in April. The Festival occurs every second week in a different community throughout the region. In addition to annual events, there are one-time events of great significance such as Fond du Lac's commemoration of the 'Signing of Treaty 8' which took place in July of this year.

2.4.4 Services

The following section provides a general overview of northern Saskatchewan's tourism services. Included in the discussion are site-specific services which provide varying types of accommodations, outdoor adventure operators which are not necessarily site-specific, and transportation which provides tourists with access to their destinations.

Services in northern communities can be broken down into a number of specific services, such as communication, food, fuel, groceries, laundry service, shower facilities, and equipment rentals. This section discusses services within larger categories that are specific to the tourism.

Exhibit 2.17 -
Events



- 1. Chilly Willy Winter Festival - Creighton
- 2. "Sensational 16th" Don Allen Saskalopet - Lac La Ronge Provincial Park
- 3. Green Lake Gymkhana - Green Lake
- 4. Fish Derby - Lac La Ronge Provincial Park
- 5. Open Air Arts & Craft Fair - La Ronge
- 6. Summer Festival - Ille-a-la-Crosse
- 7. Beautiful Valley Jamboree - Beauval
- 8. Discovery Day at the Museum - Denare Beach
- 9. Creighton Copper Fair - Creighton
- 10. Sakitawai Recreation Winter Festival - Ille-a-la-Crosse
- 11. Denare Beach Winter Festival - Denare Beach
- 12. Denare Beach Winter Festival - Denare Beach
- 13. Ken Rosenberger Memorial Walleye Classic - Denare Beach
- 14. Cameco Northern Lights Challenge - Between La Ronge - Prince Albert

2.4.4.1 Outfitters

Outfitters are revisited in this section because of the many ancillary services they provide. In addition to offering packaged fishing and hunting experiences, some camps offer accommodation and recreation to the independent tourist travelling in the north.

Fishing and hunting camps range from resort-like hospitality with large capacities providing options such as conference facilities, licenced restaurants, and whirlpools, to camps with smaller capacities, less modern facilities and fewer luxuries. Tourists may also be attracted to the ancillary recreational activities some outfitting camps offer such as snowmobile excursions, dog sledding, water recreation, boat tours, and houseboat cruises.

Tourists who frequent outfitting camps in this capacity are most often travelling along northern routes among facilities accessible by car, whereas fly-in camps are more for tourists pre-purchasing fishing/hunting package plans.

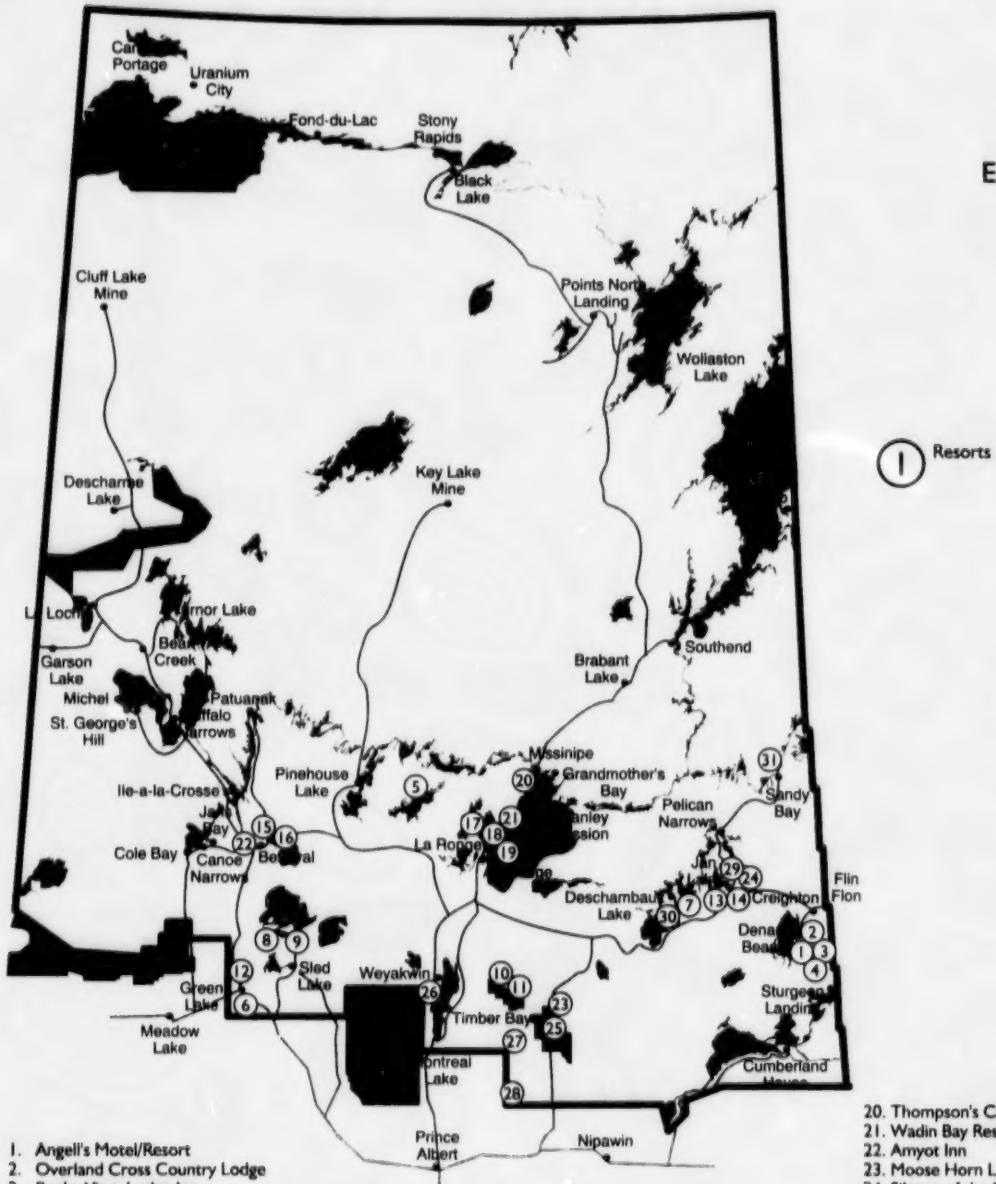
2.4.4.2 Resorts

Resorts consist of various lakeside accommodations usually with a wide range of recreational activities for vacationers. These accommodations vary but may consist of a main lodge and/or individual cabins, and many provide campsites. Resorts may also have modern service facilities for such activities as recreation and group conferences. Recreational activities such as fishing/hunting, golf, canoeing, boating, waterskiing, and snowmobiling are common, and some resorts provide outdoor adventure/outfitting packages.

Exhibit 2.18 (page 2-42) consists of 31 resorts contained in the 1999 Saskatchewan Accommodation, Resort, & Campground Guide (page 160) as well as input from the NSTTT committee. According to the Guide, 'resorts' are any lakeside accommodations that are primarily seasonal and not located within a community. Resorts provide information about their facilities to Tourism Saskatchewan and pay a fee to be included in the Guide.

2.4.4.3 Campgrounds

Many resorts (Exhibit 2.18) provide their own campsites and most communities throughout northern Saskatchewan have community or privately-owned campgrounds. Exhibit 2.19 (page 2-43) represents 45 government campgrounds in northern Saskatchewan. The range of services varies, but all offer basic facilities such as firewood and picnic tables, while some campgrounds may rent equipment such as boats or canoes. Recreation depends on the surrounding area and facilities but usually includes such activities as hiking, fishing, and boating.

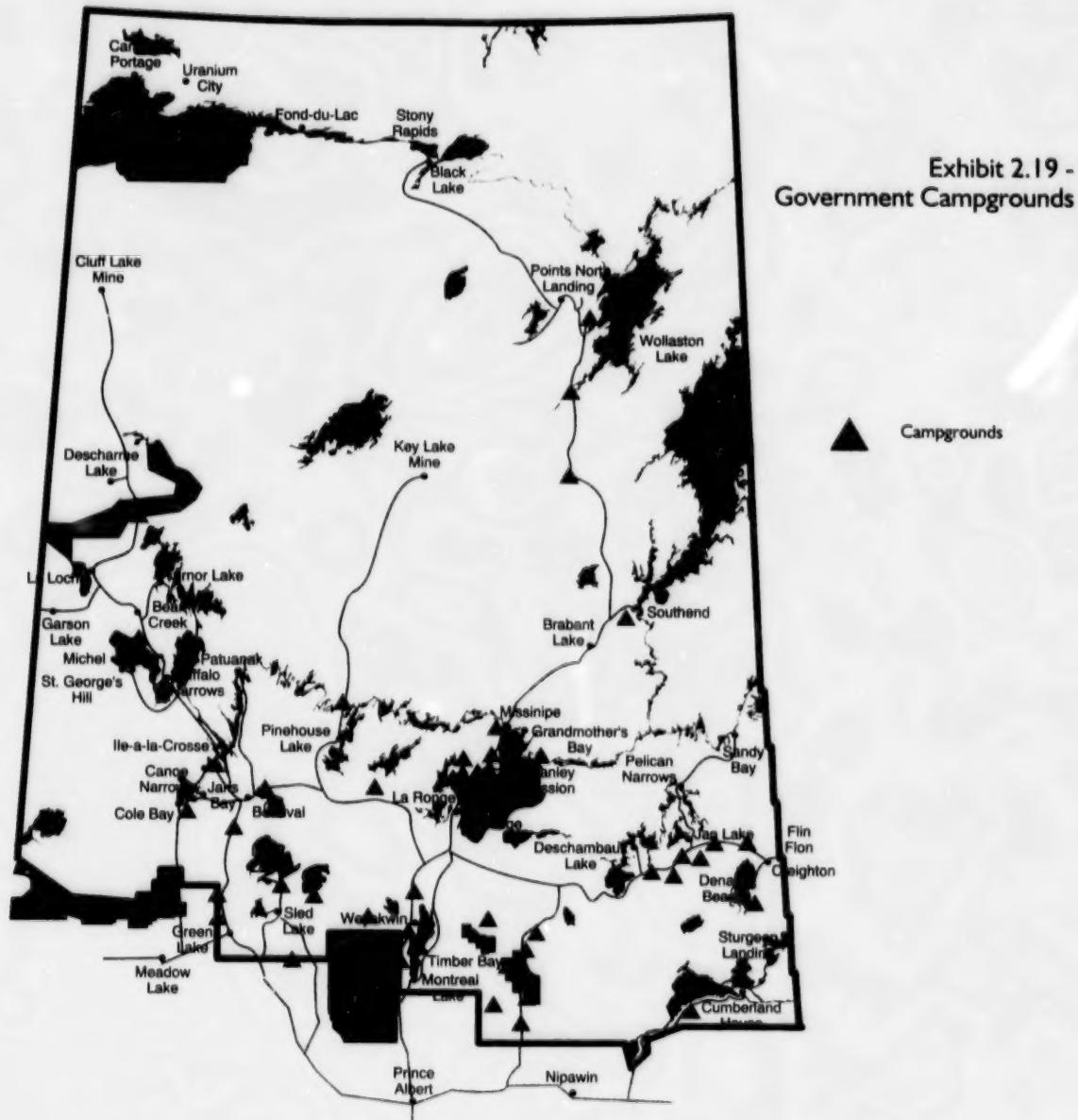


1. Angell's Motel/Resort
2. Overland Cross Country Lodge
3. Rocky View Lodge Inc
4. T & D Amisk Cabins
5. Red's Camps/Besnard Lake Campground
6. Poplar Point Resort
7. Deschambault Lake Resort
8. Dore Lake Lodge
9. Tower Lodge
10. Bay Resort/East Trout Lake Campground
11. Pine Grove Resort

12. Green Lake Lodge
13. Jan Lake Lodge
14. Three Lakes Camp
15. Darsana Lodge
16. Angler's Trail Resort
17. B & L Cabin's & Outfitters Ltd.
18. La Ronge Eagle Point Resort Ltd.
19. Long's 4 Seasons Resort Ltd.

20. Thompson's Camps Inc.
21. Wadim Bay Resort
22. Amyot Inn
23. Moose Horn Lodge
24. Silence of the North
25. Caribou Creek Lake Lodge Ltd.
26. South Bay Cabins/ Ramsay Bay Campground
27. White Swan Lake Resort
28. Katche Kamp Outfitters
29. Jan Lake R.V. Camp & Diner
30. Northern Lights Lodge
31. Slim's Cabins

Exhibit 2.18 -
Resorts



2.4.4.4 Other Accommodations

'Other' accommodations in northern Saskatchewan primarily include those not already accounted for in Exhibits 2.18 and on pages 2-35 and 2-36, although some overlap. They consist of accommodations found in or nearby northern communities and encompass hotels/motels and bed and breakfasts. Because northern communities are served primarily by outfitters, other accommodations are limited and generally serve visiting friends and relatives and business. The locations of 31 of these accommodations are displayed in Exhibit 2.20 (page 2-45).

2.4.4.5 Outdoor Adventure Operators

Outdoor Adventure Operators consist of tour operators who provide guided or self-guided tours in various areas of northern Saskatchewan. Activities provided may include hiking, canoeing, fishing, swimming, nature photography, whitewater rafting, houseboat tours, and in the winter, snowmobiling, cross-country skiing and dog sledding. Some tours are centred around themes such as native heritage and culture, archaeology and local history, or wildlife and botany. Although some tour operators operate in many different areas throughout northern Saskatchewan, common locations include La Ronge, Missinipe, the Churchill River, and Clearwater River Provincial Park. Tours may be all-inclusive and range from one- to several-day excursions.

Table 2.7 (page 2-46) lists 25 Outdoor Adventure Operators (1999 Vacation Guide and NSTTT input) who operate in northern Saskatchewan, many of which overlap with the fishing and hunting outfitters presented on pages 2-35 and 2-36. A locational reference is provided to show where tours operate, however, operators are not necessarily residents of the NAD.

2.4.4.6 Transportation

Transportation is vital to the tourism industry as it provides vacationers with access to their destinations. In the NAD, transportation is restricted to available road systems and air travel.

Roads and highways are more highly developed in the southern portion of the north extending to communities such as Creighton, La Ronge and La Loche. Most communities north of La Ronge are served by less developed gravel roads existing primarily to access remote mines. The major developed routes in the north include:

- Provincial Highway 2 extending north from Prince Albert to La Ronge.

Exhibit 2.20 -
Other Accommodations

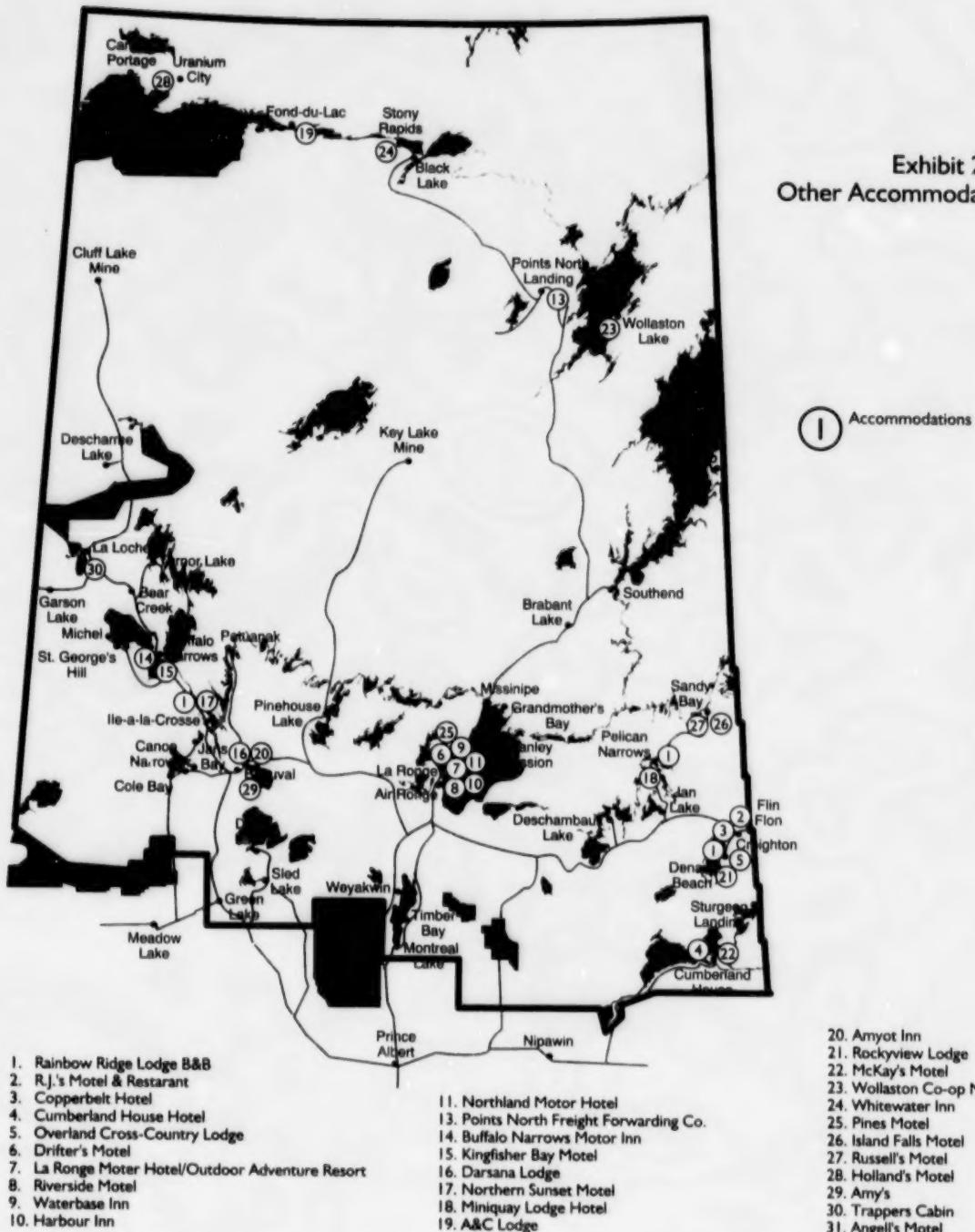


Table 2.7 - Outdoor Adventure Operators

Outdoor Adventure Operator	Locational Reference
Amisk Canadian Wilderness Adventure	Churchill River Area
B & L Cabins and Outfitters	Lac La Ronge Provincial Park
Bolton Lake Wilderness Retreat	Bolton Lake
Camp Grayling	Stony Rapids
Canadian Ways Canoeing	Northern Saskatchewan
CanoeSki Discovery Company	National/Provincial Parks
Churchill River Wilderness Camps	Sandy Lake
Clearwater Raft Tours 1994 Ltd.	Clearwater River Provincial Park
Dancing Eagle Adventure Tours	Northern Saskatchewan
Delta Discovery	Cumberland House Delta
Explore the West Tours	Saskatchewan-wide
Forest House Eco-Lodge	McLennan Lake
Great Excursions	Saskatchewan-wide
Hasbala Lake Lodge	Hasbala Lake
Hawkrock Wilderness Adventures	Hawkrock River/Northern Saskatchewan
Hinterland Adventures	Northern Saskatchewan
Horizons Unlimited/Churchill R. Canoe Outfitters	Churchill River
La Ronge Eagle Point Resort	La Ronge
LaRonge Motor Hotel/Outdoor Adventure Resort	La Ronge/Churchill River
Long's 4 Seasons Resort Ltd.	Lac La Ronge Provincial Park
Overland CrossCountry Lodge	Denare Beach
Paull River Wilderness Camp	Paull River
Rainbow Ridge Outfitters	Ile a la Crosse
Rocky View Lodge Inc.	Amisk Lake/Denare Beach
Selwyn Lake Lodge	Selwyn Lake

Source: 1999 Vacation Guide, Tourism Saskatchewan and input from the NSTTT.

- Provincial Highway 155 running north from Green Lake to La Loche.
- Provincial Highway 106 (Hanson Lake Road) extending northeast from Narrow Hills Provincial Park to Creighton.
- Provincial Highway 167 connecting Denare Beach with Creighton; at Creighton, Highway 10 extends north to Flin Flon and then continues south through Manitoba.

Other less developed routes include:

- Provincial Highway 102 extending beyond La Ronge to Southend.
- Provincial Road 905 running north from the 102 to Points North Landing with winter access extending to the Black Lake First Nation.
- Provincial Road 914 extending to the Key Lake Mine.
- Provincial Road 955 (Semchuk Trail) running north from La Loche through Clearwater Provincial Park to the Cluff Lake Mine.

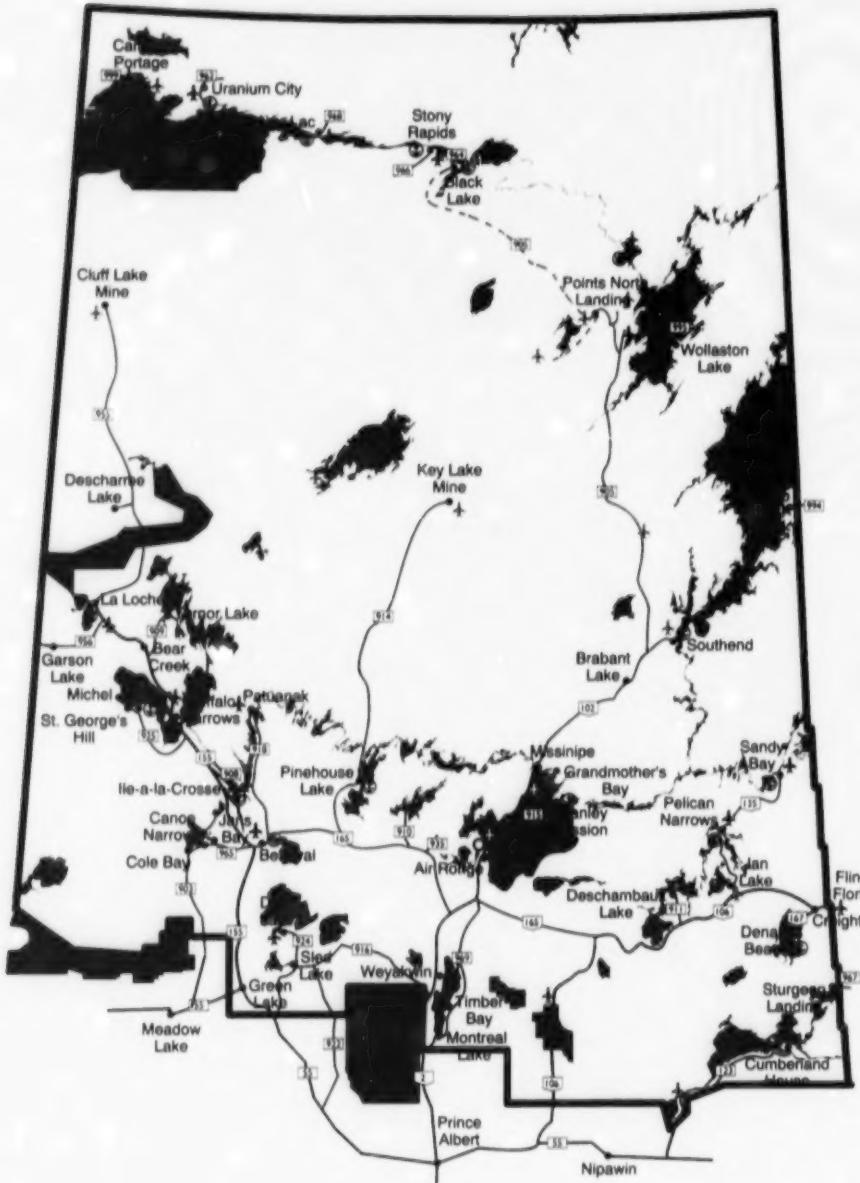
Air travel is especially important in northern Saskatchewan where there are limited or underdeveloped roads. Air Sask Aviation and Athabasca Airways are regional carriers providing scheduled flights to northern communities that include La Ronge, Points North Landing, Wollaston Post, Stony Rapids, Fond du Lac, Buffalo Narrows and Uranium City. Most northern communities also have access to chartered service by these regional airlines, West Wind Aviation and local carriers such as La Loche Airways, La Ronge Aviation Services Ltd. and Northern Dene Airways Ltd. (based in Fond du Lac). In addition, some outfitters, for example, may have private planes to transport tourists to and from base and outpost camps.

Exhibit 2.21 (page 2-48) represents road systems and air facilities throughout the NAD. Air facilities include those listed in the Canada Flight Supplement (Geomatics Canada, 1997) and are categorized as provincial, municipal, or private. Private facilities include those which are operated by an individual, company, or organization. In addition, water aerodromes and heliports have been indicated according to the Saskatchewan Air Facilities Map (Saskatchewan Property Management Corporation, Central Survey and Mapping Agency, 1990).

2.5 Organizational Inventory

This section lists and describes a number of organizations that operate in, or are represented within, northern Saskatchewan and have a function that is directly or indirectly linked with tourism development. Some organizations function primarily as a funding agency and are listed separately. Finally, a matrix of a number of funding programs in northern Saskatchewan is provided.

Exhibit 2.21 - Road Systems & Air Facilities



- Provincial Air Facilities
- Municipal Air Facilities
- Private Air Facilities
- Water Aerodromes
(Float bases)
- Heliports
- Provincial Roads
- Provincial Highways
- Paved
- Asphalt Surfaced
- Gravel Roads
- Gravel
(Winter Access Only)

2.5.1 Tourism Organizations

The following organizations that have a direct or indirect link with tourism in northern Saskatchewan are listed and described in the following pages in no particular order.

2.5.1.1 Saskatchewan Environment and Resource Management

Shield Ecoregion Head Office:
1328 La Ronge Avenue, P.O. Box 5000
La Ronge, SK S0J 1L0
(306) 425-4254

West Boreal Ecoregion Head Office:
Unit 1 - 201 2nd Street West
Meadow Lake, SK S9X 1C7
(306) 236-7540

East Boreal Ecoregion Head Office:
6th Floor - P.O. Box 3003
Prince Albert, SK S6V 6G1
(306) 953-2296

Saskatchewan Environment and Resource Management (SERM) works to manage, enhance, and protect Saskatchewan's natural and environmental resources - fish, wildlife, lands, forests, parks, air and water - for conservation, recreation, social and economic purposes and to ensure they are sustained for future generations. SERM is responsible for the development of policy and regulation with respect to the use of crown lands, the management and administration of Saskatchewan's parks, and overall environmental monitoring and regulation.

Through SERM's various branches, the department is responsible specifically for conservation, environmental and resource management, environmental impact assessments, sustainable land management, environmental protection, fire and forest protection, and forest resource management.

SERM's Fish and Wildlife branch is responsible for the development and management of sustainable fish and wildlife programs and policies. This branch is responsible for hunting and fishing licensing and regulations and also produces the Saskatchewan Hunting and Trapping Guide and the Saskatchewan Angler's Guide, important aspects of the NAD's tourism industry. The Representative Areas Network, a network of ecologically important land areas across the province, also falls under the Fish and Wildlife branch's responsibility. In addition, SERM's Parks & Special Places Branch is responsible for developing and managing programs and policies for the NAD's provincial parks and providing capital facility management and development services.

2.5.1.2 The Ecotourism Society of Saskatchewan

3834 Gordon Road
Regina, SK S4S 5X3
(306) 751-0120

The Ecotourism Society of Saskatchewan (ESS), formerly the Saskatchewan Watchable Wildlife Association Inc. (SWWA), is a non-profit organization formed in 1992. The Association is managed by a Board of Directors and members are accredited by conducting a questionnaire, paying a one-time annual fee and following the standards set out by the ESS.

The mission of the ESS is to "further both individual and industry capabilities to make tourism a viable tool for protection and perpetuation of natural and cultural ecosystems while encouraging the development of ecotourism in Saskatchewan." Among the Society's functions: provide an advocacy for issues and opportunities impacting ecotourism, act as a forum for collaboration among operators, and provide access to information services and linkages to sources of information related to ecotourism.

The Society's accreditation program is one way the ESS assists northern operators in developing environmentally responsible tourism experiences. The program sets industry standards and guidelines for suitable ecotourism experiences that are conservation-oriented. Accreditation makes it possible for northern Saskatchewan operators to compete internationally in ecotourism. In addition, the Society provides an accreditation service for Wildlife Viewing Location (WVLs) to help maintain quality service and maintain standards for tourists visiting Saskatchewan. There are three WVL's in the NAD located in each of Athabasca Sand Dunes, Clearwater River, and Lac La Ronge provincial parks.

2.5.1.3 Nature Saskatchewan

206-1860 Lorne Street
Regina, SK S4P 2L7
(306) 780-9273 or 1-800-667-4668

Nature Saskatchewan, the largest conservation organization in the province, was created over 50 years ago to promote an appreciation and understanding of the natural environment through education, conservation and research. Currently there are ten local Nature Saskatchewan societies in the province, 2,000 members, and six nature conservatories.

Funding for the administration of Nature Saskatchewan comes from Saskatchewan Lotteries, while funding for the nature conservatories is raised through membership donations and

corporate sponsorships.

Nature Saskatchewan also offers guided ecotours to unique wilderness areas in the province. Although there are no eco-tours currently taking place in the NAD, there may be potential for tours to take place in the future.

Members pay an annual fee and receive two publications: the *Blue Jay*, an internationally respected journal of nature conservation published four times a year, and the *Nature Views* newsletter (formerly *The Blue Jay News*), a quarterly newsletter that keeps members informed on environmental concerns and activities.

2.5.1.4 Ducks Unlimited

District Office:
P.O. Box 2139
Melfort, SK S0E 1AO
(306) 752-2791

Ducks Unlimited Canada (DU) is a non-profit, charitable corporation created in 1937 to care for waterfowl and wildlife habitat. DU is primarily funded by private citizens, but also receives funding from various foundations and corporate sources across North America. Its mission is to "conserve wetlands and associated habitats for the benefit of North America's waterfowl, which in turn provide healthy environments for wildlife and people." There are in excess of 1900 Ducks Unlimited projects in the province of Saskatchewan. These projects cover over 900,000 acres, and vary in size, scope and intent. DU actively looks for land that might be leased or purchased for development of wildlife habitat.

In addition to a field office, Ducks Unlimited leases the right to operate water control structures in a number of provincial Crown lands south of Cumberland House (See Exhibit 2.10 for a representation of these areas). However, it is important to note that Ducks Unlimited does not own these lands. Other northern work that may take place in the next few years include activities in the boreal forest such as waterfowl surveying and mitigation projects with forest or mining companies.

Although DU does not actively pursue members, if an individual donates more than \$20, they become a member and receive DU window decals and a free annual subscription to the association's magazine, *Conservator*.

2.5.1.5 The Saskatchewan Tourism Education Council

101-230 22nd Street East
Saskatoon, SK S7K 0E9
(306) 933-5900 or 1-800-667-7191

The Saskatchewan Tourism Education Council (STEC) is a non-profit, non-governmental organization created by the tourism industry. Their mandate is to develop a professional tourism workforce by promoting, coordinating and evaluating industry-managed standards, certification, career awareness and training. STEC has developed standards for more than 20 different occupations in the field of tourism and certification programs are available for more than a dozen front-line and supervisory occupations. STEC also provides training programs for several tourism occupations.

STEC has extensive programs, products and services accessible to the NAD. Examples include training programs for hunting guides in Buffalo Narrows and the Tourism Careers for Youth program which is ongoing in Creighton and La Ronge. STEC's occupational standards program provides northern businesses such as fishing/hunting lodges a model for effective training so they may meet national and international standards.

STEC is partnering with Saskatchewan regional colleges to introduce a internet-based small business operator program. The program will provide small businesses interactive instruction — such as the development of business plans — through computers at their own sites. The pilot stage of this project, which was scheduled to begin by September of this year, will use northern businesses as pilot sites.

2.5.1.6 Community Regional Economic Development Organizations

Community Regional Economic Development Organizations (CREDOs) are a provincial government implementation as outlined in the following objective: "Make Regional Economic Development Authorities (REDAs) and Community-based Regional Economic Development Organizations (CREDOs) the focal point for economic development in their regions." CREDOs are managed by the Economic Development Division of Saskatchewan Northern Affairs.

The purpose of the CREDOs is to help plan and implement economic development at the regional level. CREDOs identify and support business development and job opportunities in their area, provide business and program advice to residents of the region, and give northerners more effective input into government decisions. CREDOs consist entirely of northerners and may include representatives of municipal governments, development

corporations, First Nations and Metis organizations, cooperatives, community groups and local industry.

There are presently seven northern CREDOs that serve various northern communities. They are:

Clearwater Regional Development Corp.
(La Loche Region)
P.O. Box 310
La Loche, SK S0M 1G0
Ph: (306) 822-2032 or Fax: (306) 822-2395

Dazi Regional Development Corp.
(Buffalo Narrows Region)
P.O. Box 280
Buffalo Narrows, SK S0M 0J0
Ph: (306) 235-2270 or Fax: (306) 235-2288

Three Rivers CREDO Board Inc.
(Beauval/Green Lake/Ile-a-la-Crosse)
P.O. Box 280
Ile-a-la-Crosse, SK S0M 1C0
Ph: (306) 833-2632 or Fax: (306) 833-2386

La Ronge/Air Ronge Community Development Corp.
P.O. Box 210
La Ronge, SK S0J 1L0
Ph: (306) 425-3055 or Fax: (306) 425-3883

Creighton - Denare Beach CREDO
P.O. Box 478
Creighton, SK S0P 0A0
Ph: (306) 688-3538 or Fax: (306) 688-4110

Northeast Economic Development Association Inc.
(Sandy Bay/Pelican Narrows/Deschambault/Cumberland House)
c/o P.O. Box 100
Christopher Lake, SK S0J 0N0
Ph: (306) 982-4546/4818 or Fax: (306) 982-4546

Athabasca Economic Development and Training Corp.
(Wollaston/Stony Rapids/Fond du Lac/Black Lake/Uranium City/Camsell Portage)
P.O. Box 183
Wollaston Lake, SK S0J 3C0
Ph: (306) 633-2050 or Fax: (306) 633-4949

2.5.1.7 Hotels Association of Saskatchewan

1054 Winnipeg Street
Regina, SK S4R 8P8
(306) 522-1664 or 1-800-667-1118

The Hotels Association was established over sixty years ago as a lobby group for hotels. The non-profit Association includes approximately 80% of hotels located throughout Saskatchewan, as well as motels, beverage rooms, and associate members (suppliers).

Funding is raised solely by membership fees. The Association distributes a newsletter every six weeks.

The Hotels Association has many purposes, but one of its more active roles is lobbying the

government on behalf of members regarding policies that may be detrimental to hotels.

2.5.1.8 Canadian Tourism Commission

8th Floor West, 235 Queen Street
Ottawa, ON K1A 0H6
(613)946-1000

The Commission is a decision-making committee of twenty-six people, appointed by the federal government, in which the Minister of Industry Canada has vested his authority to plan, direct, manage and implement programs to generate and promote tourism in Canada, the United States and abroad, and address policy issues of importance to the future of the tourism industry on a national level. In partnership with members of the private and public sectors, the Commission's programming markets Canada as a tourist destination to selected Canadian and international tourists.

The Commission's Domestic Program's goal is for Canada to become the preferred four-season vacation destination among Canadian mature and Baby-Boomer generation travellers through implementation of an integrated marketing program. The purpose of the program is to identify customer demand and guide the product that will be promoted and advertised to the target markets. Program initiatives include utilizing the Rediscover Canada consumer database through mailings of a Canada vacation guide and seasonal newsletters, and creating affordable opportunities for tourism partners to access the database.

In Saskatchewan, the CTC partners with Tourism Saskatchewan to enable local operators to access programs. Currently the CTC along with Tourism Saskatchewan is producing a widely distributed Outdoor Adventure catalogue. The catalogue allows the inclusion of operators across Saskatchewan at a relatively low cost. The CTC's Industry Enhancement Product Club program is designed to help small and medium-sized businesses create partnering alliances regionally and nationally. In Saskatchewan, the program provides funding for product clubs such as the Aboriginal Waterways Product Club and the Saskatchewan River Basin Tourism Consortium. The purpose is to get the tourism industry working cooperatively in order to assist the groups in developing their product and making it market-ready.

2.5.1.9 Tourism Saskatchewan

1922 Park Street
Regina, SK S4P 3V7
(306) 787-2300 or 1-877-2ESCAPE

Tourism Saskatchewan is a market-driven body whose mandate is to develop and promote tourism in Saskatchewan through: tourism marketing, visitor and information services, support to education, training and public awareness, tourism research and policy, destination area product development planning, and tourism grant funding administration. Working at arms length from the government, it is driven by the tourism industry and is responsible for market research components of the provincial tourism industry.

Tourism Saskatchewan offers a variety of free products and services to tourists including the Vacation Guide, Accommodations Guide and/or Fishing and Hunting Guide, and have professional travel counsellors on hand to answer Saskatchewan vacation questions. Saskatchewan tourism region members automatically become members of Tourism Saskatchewan which provides voting privileges and travel region benefits.

Tourism Saskatchewan has various subcommittees that foster and direct the development of subsegments of the tourism industry. For example, the President' Committee on Ecotourism is responsible for implementing Saskatchewan's ecotourism strategy and developing ecotourism accreditation standards. In addition, the Committee is responsible for the implementation of the 21 recommendations of the provincial ecotourism task force.

2.5.1.10 Northern Saskatchewan Tourism Region

3700-2 nd Avenue West	P.O. Box 208	P.O. Box 220
Prince Albert, SK S6W 1A2	Shell Lake, SK S0J 2G0	Beauval, SK S0M 0G0
(306) 922-8662	(306) 427-2202	(306) 288-2165

The Northern Saskatchewan Tourism Region is a membership-based organization funded through Tourism Saskatchewan. The Region has three regional offices located in Prince Albert, Shell Lake, and Beauval, and a board of directors consisting of 23 representatives. Three full-time staff coordinate administration, membership support services, and marketing activities.

The Region's primary objective is the development and marketing of visitor attractions within the Region. The Region will achieve this by uniting tourism businesses, communities, and various associations in a cooperative marketing effort. Members are assisted through the formation of partnerships by assistance and funding at events such as trade shows, in addition to providing various promotional literature on attractions in the north.

2.5.1.11 Saskatchewan Canoe Association

P.O. Box 6064
Saskatoon, SK S7K 4E5
(306) 763-5434

The Saskatchewan Canoe Association is a non-profit organization which consists of approximately 775 members. The organization is primarily sport-oriented with three divisions: whitewater, flatwater and marathon. The biggest element of the Association is its flatwater (sprinting) division which participates in events such as the Canada Games and the Saskatchewan Games.

In the year 2000 Saskatchewan Games, the north will participate for the first time as 'Zone 9' which begins just south of La Ronge and extends north. The Association provides the technical specifications for the canoeing competition and the training of coaches.

The Association is a member of the Canadian Recreation Canoe Association (CRCA) which offers canoeing courses and clinics. The CRCA requires instructors of these courses to be members of the Saskatchewan Canoe Association. Many northern outfitters participate in instructor programs through the CRCA to obtain accreditation and may also instruct courses themselves.

2.5.1.12 Ma-Mow-We-Tak Sled Dog Racing Association

P.O. Box 2764
The Pas, Manitoba R9A 1M6
Ph/Fax: (204) 623-5093

Ma-Mow-We-Tak Sled Dog Racing Association has a membership of approximately 130 dog mushers. Its members are mostly from Saskatchewan and Manitoba, but some come from Alberta, British Columbia and the North West Territories.

The Association sets the rules and guidelines for its members for sled dog racing and also ensures the ethical treatment of the animals. Race marshals are in attendance at each race to ensure these guidelines are followed. The Association provides statistics for its members where points are tabulated at each race they attend. In the NAD, the association has reporters both in Denare Beach and Southend who provide these race results and report on any issues for inclusion in the monthly newsletter. An annual 'Spring Windup' is held to discuss issues, elect the executive committee, award the point winners, and vote on any new races to be included in the upcoming season.

The association participates in approximately ten races in the NAD in communities which include Cumberland House, Wollaston Lake, La Ronge, Southend, Pelican Narrows, Denare Beach, Beauval, Stanley Mission, and Ile-a-la-Crosse. Sled dog races are often part of each communities' annual winter festivals.

2.5.1.13 Saskatchewan River Basin Tourism Consortium

c/o Partners FOR the Saskatchewan River Basin
Meewasin Valley Authority
403 - 3rd Avenue South
Saskatoon, SK S7K 3G5
(306) 665-6887

The Saskatchewan River Basin Tourism Consortium (RBTC) is the result of a partnership between the Canadian Tourism Commission, the Partners FOR the Saskatchewan River Basin and others in the tourism industry. The RBTC consists of a variety of tourism stakeholders who consolidate resources and coordinate product development, packaging, and marketing of natural heritage and ecotourism products in the Saskatchewan River Basin. In addition, the RBTC has developed a list of guidelines and practices to be followed by members of the Consortium and operators whose services are offered in RBTC packages.

In the NAD, the North Saskatchewan River runs just west of the Manitoba/Saskatchewan border, where the River divides into the Cumberland delta. As the wholesaler for the RBTC, Weekender Tours provides "Eco-Outdoor Adventures" tour packages in this area, including destinations such as Amisk Lake, Anonymous Lake, and the Sturgeon-Weir River.

2.5.1.14 Aboriginal Waterways Product Club

Tourism Saskatchewan
1-800-667-7191

The Aboriginal Waterways Product Club (AWPC) was created through the partnership of the Canadian Tourism Commission, Tourism Saskatchewan, the Federation of Saskatchewan Indian Nations, and various Tribal Councils and Bands. The AWPC is consortium of aboriginal communities from Saskatchewan and Manitoba that, like the RBTC, have come together for the purpose of cooperative development and marketing, but specifically of aboriginally-themed tourism product. The purpose of the AWPC is to develop destination areas based on the heritage of the aboriginal cultures.

In the NAD, the Cumberland Delta of the North Saskatchewan River falls within the AWPC

regions. The AWPC may collaborate on aboriginally-themed tourism products within this region such as cultural festivals, guided packages, and ecotourism.

2.5.1.15 Parks Canada

Saskatoon Office
#310-101 22nd Street East
Saskatoon, SK S7K 0E1
(306) 975-4675

Parks Canada's mandate is to protect, preserve, and commemorate places that are significant to Canada's natural and cultural heritage. Programs within Parks Canada include National Parks, National Historic Sites, and Canadian Heritage Rivers. National Parks are protected by law and a parks management plan ensures the protection of "ecological integrity." Although there are no national parks within the NAD, Prince Albert National Park benefits the area by its proximity to it.

The National Historic Sites component of Parks Canada is responsible for Canada's program of historical commemoration, which recognizes nationally significant places, persons, and events. All such designations are made by the Minister of Canadian Heritage on the advice of the Historic Sites and Monuments Board of Canada. Parks Canada has limited involvement with historic sites in the NAD but would aid in the plaque ceremony as well as maintain the plaque and the land associated with the site.

The Canadian Heritage Rivers System (CHRS) is a cooperative program, developed and run by the federal and provincial governments. The objectives of the program are to give national recognition to Canada's outstanding rivers and to ensure long-term management and conservation of their natural, cultural, historical, and recreational values. The responsibility for nomination and management of Canadian Heritage Rivers in Saskatchewan remains with the provincial government. The CHRS is administered by the Canadian Heritage Board, of which Parks Canada has representation. Two rivers within the CHRS exist in the NAD: the Churchill and the Clearwater Rivers. Parks Canada provides public information such as promotional literature about the Canadian Heritage Rivers.

2.5.1.16 Saskatchewan Outfitters Association

3700-2nd Avenue West
Prince Albert, SK S6W 1A2
(306) 763-5434

The Saskatchewan Outfitters Association (SOA) is a business association formed in 1967 by a small group of fly-in fishing operators, and the membership has grown to include members offering canoeing, hunting and other outdoor activities throughout the province.

The primary function of the Saskatchewan Outfitters Association is to improve tourist services and facilities, promote and market its member camps, and ensure members maintain established industry standards. Approximately 260 outfitters are members of the Association, a substantial percentage of which operate in the NAD.

A 1990 study conducted to assess product diversification found that fishing outfitters need to diversify their product. The American market, which constituted approximately 90% of their clientele, was saturated. The report looked at the international market and found Europeans eager to experience the wilderness and spatial outdoors that Canada, and particularly Saskatchewan, has to offer.

Based on this report, outfitters will work on diversifying their product to reflect the demand of the European clientele. Rather than promoting fishing outfitters, the Association encourages its members to offer packages where fishing is one component of the adventure, and more emphasis is placed on the experience rather than the catch.

2.5.1.17 Aboriginal Outfitters Association

Temporary: Dwayne Hounsell
3109 Arlington Avenue
Saskatoon, SK S7J 2K1
(306) 955-0175 or (306) 222-3848

The Aboriginal Outfitters Association serves to increase awareness about aboriginal outfitting in Saskatchewan and assist aboriginal outfitters in forming their own identity. The Association represents primarily angling and hunting outfitters but includes a small number of outdoor adventure operators as well. The Association is in the process of building a membership and currently consists of approximately 20 members, the majority of which are in northern Saskatchewan.

Among the Association's functions is to lobby government on various aboriginal outfitting issues such as continuing past practices and traditional ways. The members usually meet annually to discuss training and development issues, develop a code of ethics, share marketing and operational expertise, and discuss pricing.

2.5.1.18 Indian and Northern Affairs Canada

Regional Office:
Indian and Northern Affairs
2221 Cornwall Street
Regina, SK S4P 4M2
(306) 780-5945

Indian and Northern Affairs Canada (INAC) or the Department of Indian Affairs and Northern Development (DIAND) is "working together to make Canada a better place for First Nations and Northern peoples." The department has evolved to become an advisory, funding, and supportive agency in its relations with First Nations, Inuit and northerners. INAC's programs serve to support Aboriginal self-government, support northern governments, improve living conditions in First Nations communities, and settle land claims on behalf of the Government of Canada.

The regional branch of INAC responsible for the affairs of northern Saskatchewan First Nations is the Indian and Northern Affairs office in Regina. The office acts as a funding agency to support First Nations' business and living conditions. The economic development program, in particular, provides an opportunity fund to the northern tribal councils for uses that may include tourism.

2.5.1.19 Northern Tribal Councils

Prince Albert Grand Council
P.O. Box 2350
Prince Albert, SK S6V 6J7
(306) 953-7200

Meadow Lake Tribal Council
8003 Flying Dust Reserve
Meadow Lake, SK S9X 1T8
(306) 236-5654

The Prince Albert Grand Council (PAGC) and the Meadow Lake Tribal Council (MLTC) are the political, social and corporate umbrella organizations for First Nations communities in northern Saskatchewan. Each organization manages and administers a wide range of social and economic services specific to its member bands. The Councils consist of First Nations chiefs who meet regularly to discuss First Nations issues and set the Councils' policies. Indian and Northern Affairs Canada (INAC) assists the Councils in funding for its programs.

The Councils' economic development programs exist to create employment opportunities for First Nations people and to generate profits for investment to assist First Nations members in economic self-sufficiency. The Prince Albert Development Corporation (PADC) is the PAGC's corporate arm which operates in a number of industries including

hospitality, security and janitorial services, construction, and property management. The PADC has assisted a number of PAGC First Nations in the development and planning of community-based economic development projects.

The MLTC is developing a long-range economic plan to put its communities on par with the rest of Saskatchewan over a twenty-year period. The MLTC's corporate portfolio includes several businesses as well as collective agreements and joint ventures between itself and First Nations.

2.5.1.20 Aboriginal Tourism Team Canada

Suite 820, 275 Slater Street
Ottawa, ON K1P 5H9
(613) 235-2067 or 1-800-724-7872

Aboriginal Tourism Team Canada (ATTC) was incorporated in December 1997. The ATTC's mission is: "a partnership of business and government to influence and develop tourism policies and programs to benefit Aboriginal people in Canada." The ATTC seeks to represent Aboriginal people as world leaders in tourism in harmony with their culture. Key direction for the ATTC includes Industry Development, Community Awareness & Capacity Development, Marketing, Human Resource Development, and Communication.

The ATTC serves as the umbrella organization for the Regional Tourism Authorities (RTAs) in each province. The RTAs provide the ATTC with information from their region in order to promote their aboriginal tourism product nationally. The ATTC, in turn, acts as an information and communication network for the RTAs.

The ATTC board consists of representation from each of the RTAs, industry sectors which include Hospitality, Transportation, Heritage/Cultural Products, Adventure Tourism, and Arts & Crafts, as well as government representation. Although Saskatchewan does not currently have an RTA, there is still Saskatchewan representation on the board. Once a Saskatchewan RTA is established, it will consist of all tourism regions in Saskatchewan including the Northern Tourism Region.

In addition to the ATTC's annual general meeting and quarterly board meetings, there is an annual National Forum. Saskatchewan has been selected as its location in April 2000 and a specific site will be chosen by November 1999. Northern Saskatchewan is one of the target areas under review in this site selection. The Forum provides information for new entrepreneurs and existing businesses such as funding, marketing, and start-up. Information sessions include presentations from aboriginal tourism operators from across Canada.

2.5.2 Funding Organizations

The following organizations assist tourism in the north by primarily providing funding to tourism-related businesses in the NAD.

2.5.2.1 Saskatchewan Office of Northern Affairs

1328 La Ronge Avenue
P.O. Box 5000
La Ronge, SK S0J 1L0
(306) 425-4261 or 1-800-663-4065

The mandate of the Office of Northern Affairs is to "promote the social and economic development of northern Saskatchewan communities." The Office works in partnership with federal and provincial departments, industry and communities to enhance the planning, coordination, integration, implementation and evaluation of policies, programs, projects and government communications."

Program coordination and development is through collaboration with provincial government departments and other northern agencies to "undertake northern initiatives which support northern development in the interest of northern people." The Economic Development Division provides business consulting support and assistance and administers a business loan and grant program for eligible businesses in the NAD.

2.5.2.2 Aboriginal Business Canada

Industry Canada
7th Floor, 123-2nd Avenue South
Saskatoon, SK S7K 7E6
(306) 975-4329

Aboriginal Business Canada (ABC) since 1989, has worked with more than 5,000 firms to provide financial and non-funded support. They are "dedicated to working with Aboriginal entrepreneurs to promote the development, competitiveness and success of Aboriginal business in Canadian and world markets." The program provides business services and support to Canadian status and non-status Indians, Inuit, and Metis individuals, associations, partnerships or other legal entities which are wholly or partly owned or controlled by Aboriginal people, on or off reserve.

The ABC has four strategic priorities for growth which provide conditional contribution

grants to aboriginal business. These include Youth Entrepreneurship, Tourism Businesses, Innovation, and Trade and Market Expansion. The Tourism Businesses category provides financial support to establish new businesses that offer Aboriginal cultural tourism or ecotourism experiences or to add an Aboriginal cultural tourism or ecotourism component to an existing tourism business.

Each proposal is assessed according to its own commercial viability, merits, and overall financial package. The maximum contribution for tourism activities is 60% of eligible capital and operating costs and up to 75% of the eligible costs of business planning and business support. The maximum contribution provided is \$75,000 and the business must provide a minimum of 15% cash equity in the eligible costs of the proposed venture.

2.5.2.3 Saskatchewan Opportunities Corporation

760 Saskatoon Square
410 - 22nd Street East
Saskatoon, SK S7K 5T6
(306) 933-7890

The Saskatchewan Opportunities Corporation (SOCO) is an economic development investment agency, established with a mandate to "facilitate economic growth in Saskatchewan through investment in viable businesses and infrastructure which supports the development of business."

SOCO is interested in companies involved in value-added manufacturing and processing, commercialization of new technologies, and export oriented or import replacement projects. The Corporation targets investment in six sectors that have potential for continued economic growth in the province: forestry, value-added agriculture and food processing, tourism, mining, energy, and advanced technology. SOCO provides the following programs to aide business ventures: capital loans, working capital loans, supplementary equity loans, bridge loans and business advisory services.

2.5.2.4 Saskatchewan Indian Equity Foundation

3601- 5th Avenue East
Prince Albert, SK S6V 7V6
(306) 922-2344

The Saskatchewan Indian Equity Foundation (SIEF) was created by the member nations of the Federation of Saskatchewan Indian Nations (FSIN) to provide business loans for

Saskatchewan First Nations businesses. Since its beginning in 1982, the Foundation has lent more than \$30 million. The program is designed to assist both new and existing business.

SIEF assists Saskatchewan First Nations business in both start-ups and expansions and provides developmental lending (max. \$100,000), bridge financing, fee-for-service business support, developing proposals, and referrals. Businesses must be from First Nations communities. Currently there is no allocation for operating base or capitalization as the portfolio base is inadequate to sustain development lending.

2.5.2.5 Business Development Bank of Canada

8th Floor, Canada Building
105 - 21st Street East
Saskatoon, SK S7K 0B3
1-888-463-6232

The Business Development Bank of Canada (BDC) provides small- and medium-sized businesses with financial and management services. The BDC's revised mandate includes focussing on increasing its financing of small- and medium-sized businesses operating in knowledge-based, growth-oriented industries and export markets. In addition, the BDC provides advice, guidance and networking at all stages of business development and assists in the development of business plans.

The BDC's financing programs include equity financing (venture capital), developmental loans such as term loans and small business loans, and working capital. Criteria for developmental loans include the viability of business, management expertise, and the business must complete an approved training program and have a business plan. Businesses must have a proven management record for equity financing and the BDC emphasizes existing cash flow and management expertise when providing working capital to established businesses.

2.5.2.6 Sasknative Economic Development Corporation

108 - 219 Robin Crescent
Saskatoon, SK S7L 6M8
(306) 477-4350

The Sasknative Economic Development Corporation (SNEDCO) is a Saskatchewan Metis-owned and operated business development organization, whose sole purpose is to assist in the creation of viable Metis business ventures. In order to assist these business ventures,

SNEDCO provides the following programs: capital loans, supplementary equity loans, bridge loans and business advisory services.

Only Metis who hold a valid membership with the Metis Nation of Saskatchewan residing in Saskatchewan are eligible to apply for loans. The project must be viable, and is assessed according to factors such as profitability, management ability and security availability. The maximum amount provided is \$100,000. However, there has been no capitalization since 1992, as circulated monies do not keep up with demand.

2.5.2.7 Community Futures Development Corporation

Beaver River CFDC Unit #2, 204 - 1 st Street E Meadow Lake, SK S9X 1R1 (306) 236-4422 P.O. Box 338 Buffalo Narrows, SK S0M 0J0 (306) 235-4745	Newsask CFDC P.O. Box 357 Tisdale, SK S0E 1T0 (306) 873-4449	Visions North CFDC P.O. Box 810, 711 La Ronge Ave. La Ronge, SK S0J 1L0 (306) 425-2612
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The Community Futures Development Corporation (CFDC) is a federal government initiative, established in 1986, to assist rural communities in the development of economic strategies. The program is based on the idea that local decision-making and local development are the most effective means for community changes. The CDFC's Board of Directors encompass all sectors of the community and represent industry sectors, small and large businesses, or are representatives of regional and social agencies.

The CFDC provides advice and training for market research, business plan development, basic management skills, accounting systems and financial options. CDFC's can provide small business with loans of up to \$125,000. In addition, CDFC has programs for youth and people with disabilities.

2.5.3 Northern Funding Programs

The matrix on pages 2-66 to 2-68 lists and briefly describes a number of funding programs and services available to businesses in northern Saskatchewan. Information provided includes program type, eligible project phase, support provided and any applicable conditions.

Table 2.8 - Northern Funding Programs

Funding Product	Program Type	Project Phase	Product/Support Provided	Conditions
Northern Development Fund (program of SK Northern Affairs)	Conditional Grants & Development Loans	► start-ups ► expansions	► loans for economic development ► loans for essential, non-competitive retail & service businesses and primary, traditional industries (e.g. fishing, trapping, wild rice) ► grants for marketing, research and development, and business skills and organizational development ► support to CREDOs (community/regional planning/development)	► persons who have lived in the NAD for a total of 10 years or more ► corporations, cooperatives, economic development organizations and partnerships if they are at least 51% owned by northerners who meet the above residency criteria
Saskatchewan Power Northern Enterprise Fund (SPNEF)	Developmental Loans	► start-ups ► expansions	► term loan financing up to \$100,000 for eligible northern businesses ► loan syndications	► terms project-specific ► moderate risk, low equity ► flexibility depends on security and equity
Clarence Campeau Development Fund	Conditional Grants/ Forgivable Contributions	► start-up	► grants for feasibility studies, market analysis ► grants for community development and research ► grants for training costs to improve management/marketing skills ► maximum \$10,000	► Metis individuals and communities
	Development Loans	► start-ups ► expansions ► buyouts ► joint ventures	► 'last resort' funding	► no interest, no security other than contribution agreement ► promote partnerships with bands, development corps, industry

Table 2.8 - Northern Funding Programs (continued)

Funding Product	Program Type	Project Phase	Product/Support Provided	Conditions
Economic Development Opportunities Fund	Conditional Grants/ Forgivable Contributions	<ul style="list-style-type: none"> start-ups expansions buyouts joint ventures 	<ul style="list-style-type: none"> can access more than once eligible projects include business projects that will establish or expand viable businesses and create jobs 	<ul style="list-style-type: none"> First Nations businesses eligible organizational development capacity (management expertise) with a proven business record must be matched by recipient in <u>cash</u> equity mandatory environmental assessment
Tourism Industry Loan Fund (joint Western Economic Diversification Canada & ABC initiative)	Developmental Loans	<ul style="list-style-type: none"> start-ups (R&D phase completed) 	<ul style="list-style-type: none"> patient capital assist in development of business plan assist businesses to access business information 	<ul style="list-style-type: none"> total commitment per customer cannot exceed \$500K 1% application fee (BDC) monthly account management fee
Business Improvement Loan (conventional lenders under Small Business Loan Act)	Loan Guarantee	<ul style="list-style-type: none"> start-ups expansions 	<ul style="list-style-type: none"> only for the purchase of improvement of fixed assets, not debt reduction or working capital guarantee to improve risk factor and obtain access to conventional loans 	<ul style="list-style-type: none"> gross revenue NOT exceeding \$5 million in fiscal year total outstanding loans may not exceed \$250K applicant 10% equity max. payback period 10 years

Table 2.8 - Northern Funding Programs (continued)

Funding Product	Program Type	Project Phase	Product/Support Provided	Conditions
Industrial Research Assistance Program (IRAP)	Conditional Grants/ Forgivable Loans	► start-ups ► expansions	► grants for R&D for technology enhancement projects or new approaches in technology field advisory services: - technical advice/info - literature and patent searches	► cannot be used for purchase of materials or equipment
	Developmental Loans	► start-ups ► expansions	► precommercialization assistance (repayable contributions - royalty based or fixed payment options)	► near-market development and demonstration projects for new or significantly improved technological projects or processes ► business viability ► must have management expertise and adequate resources to complete project
Sask. Government Growth Fund (SGGF)	Developmental Loans and Equity Financing (Venture Capital)	► start-ups ► expansions	► high risk debt and equity capital for companies with strong growth potential ► expansions are main focus ► tourism is an eligible activity	► high risk category: must have proven management record

Section 3.0

Assessment of Secondary Research

3.0 Assessment of Secondary Research

3.1 Introduction

Over the past two decades, numerous studies relevant to tourism in the Northern Administration District have been produced. These studies focus on a wide range of issues, including such topics as cultural tourism, ecotourism, outfitting, and resort development. Gaining access to this information can be challenging for a tourism operator or organization. For this reason, this section has been developed to serve as a research directory for those seeking northern tourism research.

3.2 Information Gathering Process

The directory found in Table 3.1 on the following pages was developed through consultation with various organizations. Among these were Saskatchewan Northern Affairs, Tourism Saskatchewan (Saskatoon and Regina offices), Industry and Trade Canada, Saskatchewan Environment and Resource Management (SERM), and the consultant's library of tourism research. Each document in the directory is assessed for its relevance to tourism in the Northern Administration District through consideration of criteria such as the applicability of the research to current and future issues in northern tourism, the scope and depth of the research, and the age of the document. Each listing is then ranked as having high, moderate, or low relevance to the northern tourism industry. All of the documents can be sourced at the Northern Affairs office in La Ronge or can be found through contact with the office.

3.3 Summary of Document Types

Several types of reports are listed in Table 3.1. They include consultants' strategies which are based on regional, cultural, and industry sector themes, such as the Northeast and Northwest Saskatchewan Tourism Destination Strategies, the Metis Tourism Development Strategy, and Ecotourism in Saskatchewan, Reports I & II. These documents provide comprehensive analysis of current and potential markets and products.

Several reports in the directory focus on tourist behaviour, and are generally produced by government-funded agencies and departments such as the Canadian Tourism Commission. Policy documents produced by government departments are also on the list. These documents are useful reference tools for specific industries (e.g. outfitting). Several feasibility studies and development plans are shown. These generally are specific to a particular location, but may be useful as a planning tool for similar developments elsewhere. Finally, some of the listings are collections of research on specific topics that have been produced by universities and industry organizations.

Table 3.1 - Studies Relevant to Northern Tourism

Study Title/Author	Year	Areas of Focus	Relevance to Northern Tourism	Rating of Relevance
Metis Tourism Development Strategy/ Ron Rivard Management	1998	Metis tourism development.	<ul style="list-style-type: none"> Establishes two broad activities that are required for Metis Tourism: to build the tourism ethic in the Metis community and to build a supportive infrastructure. Discusses the roles various levels of administration within the Metis Nation should play in the development of Metis tourism products. Identifies fixed attractions and services that could be developed with Metis themes and ownership. Identifies methods for integrating Metis tourism initiatives with provincial and Aboriginal programs. 	High
A Market Analysis for Aboriginal Theme Tourism Products in Saskatchewan/ KPMG	1996	Aboriginal tourism development.	<ul style="list-style-type: none"> Recommends the development of cultural standards; an authenticity certification process; the development of anchor attractions; training programs, etc. Examines existing and potential markets and products for Aboriginal tourism. Establishes product development guidelines and training needs. Identifies partnership and corridor development opportunities for aboriginal theme tourism. 	High
Ecotourism in Saskatchewan: Report 1 - State of Resource/ Anderson/Fast & Associates	1996	Ecotourism potential in Saskatchewan.	<ul style="list-style-type: none"> Assesses Saskatchewan's natural tourism resources as well as its present state of ecotourism development. Provides an inventory and assessment of eco-sites and analyses their state of readiness for tourism. Identifies 20 eco-sites in the NAD Identifies current infrastructure and key stakeholders and discusses criteria necessary for ecotourism development. 	High

Table 3.1 - Studies Relevant to Northern Tourism (continued)

Study Title/Author	Year	Areas of Focus	Relevance to Northern Tourism	Rating of Relevance
Ecotourism in Saskatchewan: Report II - A Working Strategy/ Anderson/Fast & Associates	1996	Ecotourism development.	<ul style="list-style-type: none"> Develops an ecotourism planning model for the province and evaluates the tourism potential of the ecosites identified in the State of Resource report. Sets out six initiatives critical to the development of ecotourism in Saskatchewan, including: management, criteria and accreditation, product development, marketing and public relations, community participation, and human resources. Identifies specific development opportunities which incorporate numerous ecosites, including several in the NAD. 	High
Ecotourism in Saskatchewan: Report III - Primary Research/ Anderson/Fast & Associates	1996	Potential travel trade interest in Saskatchewan ecotourism.	<ul style="list-style-type: none"> Measures the travel trade's receptiveness to ecotourism product in Saskatchewan. Identifies travel trade's specific interests and barriers to doing business in Saskatchewan. Tests interest in specific package opportunities, including two in the NAD. Makes strategic recommendations based on the travel trade's input. 	High
Policy on Outfitting in Saskatchewan/ Saskatchewan Environment and Resource Management (SERM)	1997	Outfitting policies in Saskatchewan.	<ul style="list-style-type: none"> Describes mandates, regulations, and rationale for the regulations. A five-year action plan is also included. Includes detailed policy information on outfitting on reserves and land purchased under the Saskatchewan Treaty Land Entitlement Framework Agreement. Outlines SERM's policy to facilitate greater northern resident involvement in northern outfitting. Discusses SERM's policies on resource allocation to outfitters and between outfitters. 	High

Table 3.1 - Studies Relevant to Northern Tourism (continued)

Study Title/Author	Year	Areas of Focus	Relevance to Northern Tourism	Rating of Relevance
Northwest Saskatchewan Tourism Destination Strategy/ IMC Consulting Group Inc. & Beak Associates Consulting Ltd.	1991	Tourism marketing strategy for northwest Saskatchewan.	<ul style="list-style-type: none"> Assesses potential tourist markets for northwest Saskatchewan. Identifies and evaluates opportunities for tourism development in several areas of the northwest. Provides basic feasibility assessments of potential fixed attractions. Recommends several means of fostering awareness of the benefits of tourism development in the local population. 	High
Northeast Saskatchewan Tourism Destination Strategy/ Hilderman Witty Crosby Hanna & Associates	1992	Tourism marketing strategy for northeast Saskatchewan.	<ul style="list-style-type: none"> Evaluates all factors influencing tourism development in the northeast region. Divides the northeast into four proposed destination areas and examines the specific tourism potential of each. Identifies and prioritizes opportunities for attractions and services. Proposes several fixed attraction and tour opportunities. 	High
Ecotourism Accreditation Standards for Saskatchewan/ Ecotourism Society for Saskatchewan	1998	Ecotourism standards and guidelines for operators.	<ul style="list-style-type: none"> Introduces a set of ecotourism values that puts a strong emphasis on respecting and preserving nature ahead of commercial interests. Establishes terms and conditions of accreditation as well as accreditation standards for ecotourism operators. 	High
Preliminary Study - South Bay Park Proposal/ Pineridge Consultants	1983	Potential tourist facilities on Lac-Ille-a-La-Crosse.	<ul style="list-style-type: none"> Identifies tourism development options for local tourism authority. 	High

Table 3.1 - Studies Relevant to Northern Tourism (continued)

Study Title/Author	Year	Areas of Focus	Relevance to Northern Tourism	Rating of Relevance
First Nations Guidelines/ Walking Bear Consulting	1999	Ethical guidelines for aboriginal tourism.	<ul style="list-style-type: none"> Proposes a system of registration, standards, inspection, and certification of all First Nations-owned tourism facilities and hospitality services. Recommends the establishment of a First Nations certification authority for all products to be marketed. 	High
Clearwater Clear Lake Metis Region - Action Plan for Sustainable Tourism Development/ G. Ward & Associates	1999	Metis tourism development.	<ul style="list-style-type: none"> Examines the potential of several potential products. Identifies baseline needs for the development of Metis-driven tourism in the Clearwater Clear Lake Region. 	High
A Plan to Make the Saskatchewan Outfitting Industry More Competitive/ KPMG	1991	Development of the outfitting industry.	<ul style="list-style-type: none"> Examines market and product issues affecting the profitability of outfitting operations. Identifies barriers to development of the industry and ways to overcome them. Outlines opportunities for operators to become more competitive. 	High
1994 Northern Tier State Study - Saskatchewan Chapter/ Canadian Tourism Commission	1994	Northern Tier State travel to Saskatchewan.	<ul style="list-style-type: none"> Discusses Northern Tier (Montana, North Dakota, etc.) target markets and their potential to visit Saskatchewan. Presents an opportunity grid analysis and matches products with the Northern Tier's travel interests. 	High
The Northern Tourism Experience: 1994 Domestic and Inbound Markets to Canada's North/ Canadian Tourism Commission	1994	Visitors to Canada's north.	<ul style="list-style-type: none"> Discusses markets, experience, visitor profile, and activity segmentation of visitors to Canada's north. 	High

Table 3.1 - Studies Relevant to Northern Tourism (continued)

Study Title/Author	Year	Areas of Focus	Relevance to Northern Tourism	Rating of Relevance
Manitoba/Saskatchewan Winter Tourism Marketing Strategy/ KPMG	1993	Winter tourism potential.	• Evaluates specific opportunities for winter tourism.	Moderate
Shaping Tomorrow's North: The Role of Tourism and Recreation/ Margaret E. Johnston, G. David Twynham, and Wolfgang Haider, Editors	1998	Northern tourism development.	• Presents a series of articles on the development of northern tourism, particularly in Ontario.	Moderate
Saskatchewan's Neighbours and Residents: A Tourism Market Assessment from the 1994 Canadian Travel Survey/ Tourism Saskatchewan	1995	Travel activity from the prairie provinces.	• Discusses overnight tourism activity, segmenting activity by travel from Alberta, Manitoba, and Saskatchewan.	Moderate
Saskatchewan U.S. Long-Haul Analysis/ Tourism Saskatchewan	1995	Long-haul U.S. tourists in Saskatchewan.	• Discusses trip characteristics, point of origin visitors and inquiries, as well as preferred activity profile.	Moderate
Community and Cultural Tourism/ Conference Proceedings of the Travel and Tourism Research Association - Canada	1992	Submissions on Aboriginal tourism.	• Summarizes a number of presentations on subjects ranging from community-based tourism in northern communities to the development of tourism products.	Moderate
Market/Financial Feasibility Study and Business Plan for Proposed Northern Remote Training and Conference Centre/ E.M. Brown and Associates Inc.	1990	Development of Northern Remote Training and Conference Facility.	<ul style="list-style-type: none"> Identifies potential markets for the facility and identifies barriers to reaching these markets, and strategies to overcome these barriers. Provides feasibility analysis including pro forma income statements. 	Moderate

Table 3.1 - Studies Relevant to Northern Tourism (continued)

Study Title/Author	Year	Areas of Focus	Relevance to Northern Tourism	Rating of Relevance
Fishing and Hunting Lodges/Resorts in Canada: A Position Paper/ Tourism Canada	1990	Fishing and Hunting Lodges.	<ul style="list-style-type: none"> Analyses products, markets, and regional variations of fishing and hunting lodges and resorts. 	Moderate (becoming dated)
United States Repeat Visitor Study/ Industry Canada	1995	Repeat U.S. travellers.	<ul style="list-style-type: none"> Provides insight into repeat visits to Canada by U.S. travellers. Examines characteristics of these travellers and relates frequency of visitation to these characteristics. 	Moderate
Inventory of Canadian Aboriginal Cultural Tourism Products/ Industry Canada	1993	Aboriginal Tourism	<ul style="list-style-type: none"> Profiles operators, products, and aboriginal cultural themes. 	Moderate
Adventure Travel in Canada: An Overview of Product and Market Potential/ Industry Canada	1994	Adventure travel.	<ul style="list-style-type: none"> Provides a comprehensive overview of the adventure travel sector in Canada from a national and international perspective. 	Medium
Ecotourism Potential in Northern Alberta/ Cottonwood Consultants, Gaia Consultants, and HLA Consultants	1992	Ecotourism opportunities in Alberta's north.	<ul style="list-style-type: none"> Evaluation of ecotourism opportunities and analysis of constraints. 	Low (dated)
A Study to Determine the Impact of Events on Local Economies/ Derek Murray Consulting Associates Inc.	1984	Economic impact of events in communities.	<ul style="list-style-type: none"> Assesses the economic impact of events on local economies and evaluates their potential to draw tourists. Focuses mainly on events in southern Saskatchewan. 	Low (dated)

Table 3.1 - Studies Relevant to Northern Tourism (continued)

Study Title/Author	Year	Areas of Focus	Relevance to Northern Tourism	Rating of Relevance
A Feasibility Study for a Wilderness Resort at Lac La Ronge, SK/ Derek Murray Consultants Ltd.	1985	Potential development of a resort.	• Assesses market interest in, and financial feasibility of, developing of a 50-60 room four-season resort near La Ronge.	Low (dated)
An Economic Appraisal of Saskatchewan's Outfitting Industry/ D. Topolinski, L. Inkster & K. Daley	1983	Economic impact of outfitting.	• Measures economic impact of Saskatchewan outfitters using 1981 data.	Low (dated)

Section 4.0

Review of Non-Tourism Industries

4.0 Review of Non-Tourism Industries

4.1 Introduction

Sections 2.0 and 3.0 identified key northern tourism stakeholders and research studies. There are several other major stakeholders in the north — industries or groups who rely on the same resources as tourism operators — and their impact needs to be understood. This section provides an overview of these non-tourism stakeholders and includes a second research database, this time of non-tourism studies relevant to the tourism industry.

4.2 Non-Tourism Sector Organizations

This section discusses non-tourism sector organizations and groups of individuals which have a stake in development of the north. Many of these organizations are community groups or committees which bring together people with diverse backgrounds and objectives, but who seek to find a common solution to their respective needs. Some examples include the Crown Land Management Steering Committee, provincial park advisory groups, and renewable resource co-management boards. Also important are community advisory boards which have been set up to direct Integrated Forest Land Use Plans (IFLUPs). A listing of these boards and the nature of their work is described in Table 4.1.

In addition to the IFLUPs, other non-tourism organizations include resource-based industry associations such as the Saskatchewan Mining Association, the Northern Fur Conservation Area Trappers Association, and the Saskatchewan Commercial Fishermen's Co-operative Federation. The Federation of Saskatchewan Indian Nations, individual First Nations bands, and the Metis Nation of Saskatchewan, and municipal councils represent aborigines and other resident stakeholders in the north. Finally, the Saskatchewan Archaeological Society is concerned with the preservation of the north's archaeological resources.

4.3 Information Gathering Process

The non-tourism research directory is the product of consultation with SERM, Saskatchewan Northern Affairs, and Tourism Saskatchewan, as well as an extensive Internet search. The documents in the directory have been evaluated with respect to their significance to the northern tourism industry in general and to tourism operators in particular. The documents listed in Table 4.1 have been assessed according to similar criteria as those in Table 3.1, namely their applicability to current and future issues in northern tourism, their scope and depth, and the date when they were produced. As with Section 3.0, each listing is ranked as having high, moderate, or low relevance to the northern tourism industry.

Table 4.1 - Non-Tourism Research Directory

Study Title/Author	Year	Areas of Focus	Relevance to Northern Tourism	Rating of Relevance
State of the Environment Report: The Boreal Shield Ecozone/ Saskatchewan Environment and Resource Management (SERM)	1999	All aspects of the Boreal Shield.	<ul style="list-style-type: none"> Provides broad summaries of northern development issues. Provides a comprehensive summary of the physical, biological, and cultural life of the Boreal Shield. Outlines specific impacts of human activity that are considered to have a negative impact on the ecozone and what actions, if any, are being conducted to mitigate these actions. 	High
State of the Environment Report: The Boreal Plain Ecozone/ SERM	1995	All aspects of the Boreal Plain.	<ul style="list-style-type: none"> Provides broad summaries of northern development issues. Provides a comprehensive summary of the physical, biological, and cultural life of the Boreal Plain. Outlines specific impacts of human activity that are considered to have a negative impact on the ecozone and what actions, if any, are being conducted to mitigate these actions. 	High
State of the Environment Report: The Taiga Shield Ecozone/ SERM	2001 ?	All aspects of the Taiga Shield.	<ul style="list-style-type: none"> Will provide the same types of information found in the two reports listed above, but will concentrate on the Taiga Shield. 	High
The Ecoregions of Saskatchewan/ Canadian Plains Research Centre/SERM	1998	Natural features and human land use of Saskatchewan.	<ul style="list-style-type: none"> Discusses all of Saskatchewan's ecoregions in detail and describes the human impact upon their natural resources. 	High
Pasquia-Porcupine Land Use Plan/ SERM	1999	Land/resource use and conservation.	<ul style="list-style-type: none"> Recommends the designation of three land use areas where certain activities may or may not take place, in order to minimize conflicts between non-compatible land uses and ensure the health of the ecosystem is maintained. 	High
La Ronge Land Use Plan/ SERM	draft stage	Land/resource use and conservation.	<ul style="list-style-type: none"> Developing management objectives and guidelines for development of a 400 km² area around the town of La Ronge using input from a local advisory board. 	High

Table 4.1 - Non-Tourism Research Directory (continued)

Study Title/Author	Year	Areas of Focus	Relevance to Northern Tourism	Rating of Relevance
Nemeiben Area Land Use Plan/ SERM	proposed	Land/resource use and conservation.	<ul style="list-style-type: none"> Seeks to resolve conflict and find solutions between proponents of various types of potential industry development, area residents, traditional users, recreational users, and environmental groups. 	High
Dore Smoothstone Land Use Plan/ SERM	draft stage	Land/resource use and conservation.	<ul style="list-style-type: none"> Focuses on the development of a plan which will manage use of the land and of the renewable and non-renewable resources on an integrated and environmentally sound basis. 	High
Amisk Land Use Plan/ SERM	draft stage	Land/resource use and conservation.	<ul style="list-style-type: none"> Developing resource and land use strategies for the region from Amisk Lake in the south to Reindeer Lake in the north, and from the Manitoba border to west of the Reindeer River. 	High
Athabasca Plain Land Use Plan/ SERM	proposed	Land/resource use and conservation.	<ul style="list-style-type: none"> Developing an agreement for the cooperative planning and management of land and resources in the Athabasca Plain Ecoregion. 	High
Saskatchewan's Provincial Parks: Directions for the 21 st Century/ SERM	1997	Provincial Parks.	<ul style="list-style-type: none"> Recommends enhanced natural and cultural resource protection and the establishment of different recreational experiences, facilities, and services for different park lands. Recommends establishment of different interpretive/educational experiences for different park lands. Recommends upgrading basic recreational services and customer service. Recommends commitment to public involvement and park partnerships in park management. Recommends basing financial subsidization of park services, facilities, and programs on the degree of public benefit. 	High

Table 4.1 - Non-Tourism Research Directory (continued)

Study Title/Author	Year	Areas of Focus	Relevance to Northern Tourism	Rating of Relevance
The Churchill: A Canadian Heritage River — Conference Proceedings	1995	The Churchill River.	• Includes a number of studies done on issues affecting the Churchill river, including topics such as recreational carrying capacity and water management.	High
Meet the North, Build a Vision/ Conference Report	1999	Several northern issues.	• Summarizes delegates input on economic, political, tourism, transportation, and workforce issues.	Moderate
Saskatchewan Long-Term Integrated Forest Resource Management Plan/ SERM	1995	Forest usage and preservation.	• Inventories Saskatchewan's forest characteristics, economic and non-economic values, and identifies SERM's processes to enable integrated forest resource management.	Moderate (beginning replaced by new agreements)
			• Sets out SERM's plan for action, including sub-strategies with different industries including tourism.	
			• Assesses forest uses and identifies opportunities for the sustainable use of the forest.	
Clearwater River Saskatchewan/ Johnson and Weichel, Resource Management Consultants	1982	The Clearwater River.	• Lays groundwork for designation of the Clearwater as a Canadian Heritage River and for the area surrounding it to become a provincial park. Many of the reports recommendations have been put into action already.	Moderate
Protected Areas in Saskatchewan: A Statistical Report	1993	Designated protected areas.	• Inventories and describes all protected areas in Saskatchewan.	Moderate
Denare Beach Planning Study Review/ DS-LEA Associates Ltd.	1984	Community planning study	• Updates 1978 plan and provides direction on development and capital improvement.	Low
Beauval Community Planning Study/ Institute for Northern Studies, University of Saskatchewan	1979	Community planning study.	• Examines all aspects of Beauval and its environs and makes recommendations regarding all forms of land use.	Low (dated)

4.4 Non-Tourism Resource Users

Non-tourism resource users make use of the natural resources of the north. These industries and groups can be divided into the categories identified in Table 4.2. Their impact on the resource base of the north and, in turn, on the tourism industry varies greatly. SERM has produced several reports which document the effects of these industries on the environment and on potential conflicts with other resource users such as the tourism industry. Much of the information found in this section of the report is based on upon these documents, all of which are listed in Table 4.1.

Table 4.2 - Non-Tourism Resource Users Categories

Resource User Category	Location(s) in North
Forestry	Across Boreal Plain and some southeastern areas of the Boreal Shield
Mining	Mining activity mostly in eastern Boreal Shield / new oil exploration in western Boreal Plain
Hydroelectric Dams	Island Falls, White Lake, & E.B. Campbell
Commercial Trapping	Across the north
Commercial fishing	Hundreds of northern lakes
Wild rice production	Numerous water bodies in the Boreal Plain and Boreal Shield
Specialty forest products	Across the north, but currently occurs mostly south of the Churchill River
Subsistence hunting, fishing, and trapping	Across the north

4.4.1 Forestry

Forestry has perhaps the greatest impact on the northern tourism industry because it has the greatest potential to alter northern ecosystems. This is especially true on lands in which forestry companies already have rights to develop, such as large portions of the Boreal Plain and the southern Boreal Shield. The new Forest Resources Management Act and regulations are intended to "provide a legal framework for ensuring that the informed public has the right to participate in deciding how to balance the need to use provincial forests for

economic benefits while ensuring the long-term health of forest ecosystems is protected.⁵

Saskatchewan's new forest development plan involves a major expansion of forest industry in Saskatchewan. New forestry industry investments are being made involving partnerships between large national corporations and smaller Saskatchewan companies. Almost all of these new developments involve northern Saskatchewan communities. Consequently, the forest industry will more than double its size over the next ten years as a direct result of the redistribution of forest lands formerly held by Weyerhaeuser Canada.⁶

These new developments are based on the conditional allocation of surplus wood volumes from the Weyerhaeuser forest management area made available to the more than 200 independent forestry operators in Saskatchewan. At the time of this writing, the largest potential partnership is between Ainsworth Lumber Ltd. of British Columbia and Peter Ballantyne Cree Nation which will use some of the former Weyerhaeuser forest lands for a new sawmill in Deschambault Lake, although this deal is tentative. A sawmill in Creighton and a finger-jointer plant in Prince Albert are also proposed.

In addition to transferring surplus wood supply, Weyerhaeuser is more than doubling production of the Big River sawmill, making it one of the largest mills in Canada, and partnering with the Lac La Ronge Indian Band, the Peter Ballantyne Cree Nation and the Montreal Lake Cree Nation to build a new Wapawekka sawmill in Prince Albert.

- ▶ Lac La Ronge Indian Band and Zelensky Brothers are partnering to build a new sawmill in La Ronge.
- ▶ Northwest Community Wood Product Corporation, a partnership of five northwest Metis communities — Green Lake, Beauval, Ile-a-la-Crosse, Patuanak, and Pinehouse — will build a new sawmill in Beauval and a finishing site in Green Lake.
- ▶ Green Lake Metis Wood Products will build a finger jointer plant together with Stillwater Forest Products of Montana.
- ▶ Ainsworth Lumber Ltd. and Norsask Forest Products will build an Oriented Strand Board (OSB) mill in Meadow Lake and L & M Wood Products will undertake a sawmill expansion and a new wood treatment plant in Glaslyn.

⁵ Forest Resources Management Act, Government of Saskatchewan, 1996.

⁶ Government of Saskatchewan press release, April 26, 1999.

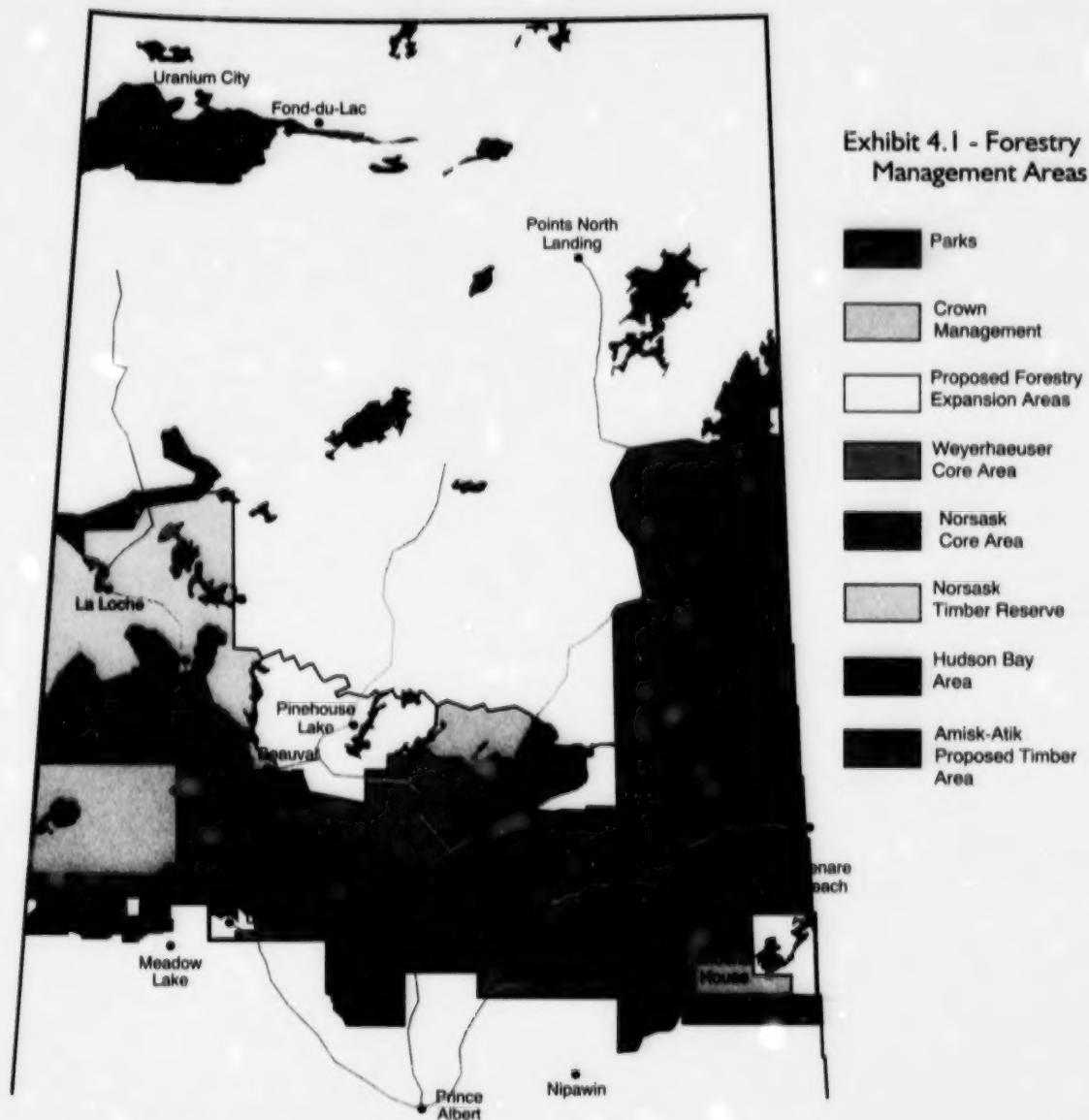


Table 4.3 - Major Forest Expansion - Summary

Company/Partnerships	Projects	Jobs (direct)	Jobs (indirect)	Capital Investment
Weyerhaeuser	Big River sawmill, Big River	420	840	\$70 million
Weyerhaeuser with Lac La Ronge Indian Band, Peter Ballantyne Cree Nation and Montreal Lake Cree Nation	Wapawekka sawmill, Prince Albert	80	160	\$22 million
Weyerhaeuser	Environmental upgrade at Prince Albert pulp and paper complex	—	—	\$315 million
Peter Ballantyne Cree Nation and Ainsworth Lumber Ltd. of B.C.	New sawmill in Creighton	280	560	\$85 million
Peter Ballantyne Cree Nation and Ainsworth Lumber Ltd. of B.C.	New sawmill in Deschambault Lake	25	50	\$2 million
Peter Ballantyne Cree Nation and Ainsworth Lumber Ltd. of B.C.	New finger jointer plant in Prince Albert	40	80	\$5 million
Peter Ballantyne Cree Nation and Ainsworth Lumber Ltd. of B.C.	Woodlands Operations	15	30	\$1 million
Lac La Ronge Indian Band and Zalensky Brothers	New sawmill in La Ronge	200	400	\$15 to \$20 million
James Smith Cree Nation and Suntec Forest Products	Sawmill and value-added remanufacturing facility at Zenon Park.	165	330	\$8 million
L & M Wood Products	Sawmill expansion and new wood treatment plant in Glaslyn	40	80	\$2 million
Saskfor MacMillan	New OSB mill in Hudson Bay	640	1280	\$175 million

Table 4.3 - Major Forest Expansion - Summary (continued)

Company/Partnerships	Projects	Jobs (direct)	Jobs (indirect)	Capital Investment
Northwest Communities Wood Products (partnership among five Northwest Metis communities - Green Lake, Beauval, Ile a la Crosse, Patuanak, and Pinehouse)	New sawmill in Beauval with a finishing site in Green Lake	165	330	\$11 to \$15 million
Partnership between Green Lake Metis Wood Products and Stillwater Forest Products of Montana	New finger jointer plant, Green Lake and Saskatoon	40	80	\$5 million
Partnership between Ainsworth Lumber Ltd. and Norsask Forest Products	New Oriented Strand Board (OSB) mill in Meadow Lake	340	680	\$145
More than 200 independent forestry operators in province	Will see large increase in available wood volumes	934	1868	\$10 million
Total		3322	6644	\$851 million
Total - Jobs direct and indirect jobs created		9956		

Phase II Opportunities	Projects	Jobs (Direct and Indirect)	Investment
Newsprint facility	Potential private investment	Up to 1,000 jobs	\$250-\$650 million
Agricultural lands	Wood may be available	Up to 3,000 jobs	Unknown at present
Investment-based fire protection	Wood may be available	Up to 5,300 jobs	Unknown at present
Value-added sector	Coordinating long-term approach	Up to 6,000 jobs	Unknown at present
Total		Up to 15,300 jobs	More than \$250 million

Source: Government of Saskatchewan press release - April, 1999

4.4.2 Mining

All of Saskatchewan's active mines are located in, or border on, the Boreal Shield. This ecozone has a wide range of non-renewable mineral resources, including uranium, gold, copper, lead, zinc, silver, and nickel. Numerous mines have extracted minerals within the Boreal Shield including six active uranium mines, one active gold mine, one active base metal mine, three gold mines, and several orphaned or abandoned mines.⁷ Table 4.3 on Page 4.9 lists all active and inactive mines in the Boreal Shield Ecozone. Uranium mines have also been decommissioned in the Taiga Shield near Uranium City. A map of active mines is shown in Exhibit 4.2 on Page 4-11.

There is a considerable amount of preliminary mining activity being conducted in northern Saskatchewan, most of it on provincial Crown land. There are currently more than 1,200 mineral dispositions (leases and claims) held by companies involved in the exploration and development of mineral resources in the ecozone. The majority of the more than 2.2 million hectares under disposition are associated with mineral exploration. Activities associated with mineral exploration include prospecting, line-cutting, trenching, drilling, road construction, and geophysical surveys (ground and airborne).

Road construction for mining and forestry has a significant impact on the north. Not only do roads alter the environments they pass through, but they also make previously inaccessible lands and water bodies accessible. This, in turn, means that more hunters, fishermen, and other recreation enthusiasts make use of these areas which often eventually leads to some development (e.g. cabins, lodges, etc.) taking place.

4.4.3 Hydroelectricity

Three hydroelectric power generating stations are situated in or near the Northern Administration District (NAD). The E.B. Campbell Hydroelectric Station is located on Tobin Lake, at the southeastern fringe of the NAD. Cumberland House, the Cumberland House First Nation, and the ecologically important Cumberland Delta are downstream from the dam. Further north, the Island Falls Hydroelectric Station is situated just upstream of the community of Sandy Bay. Its primary purpose is to provide power to northern Saskatchewan. Finally, three small stations on the Charlot River north of Lake Athabasca also provide power to northern Saskatchewan. These facilities are known as the Athabasca Hydro System. All dams in northern Saskatchewan are mapped along with mines in Exhibit 4.2.

⁷

State of the Environment Report: The Boreal Shield Ecozone, SERM, 1999.

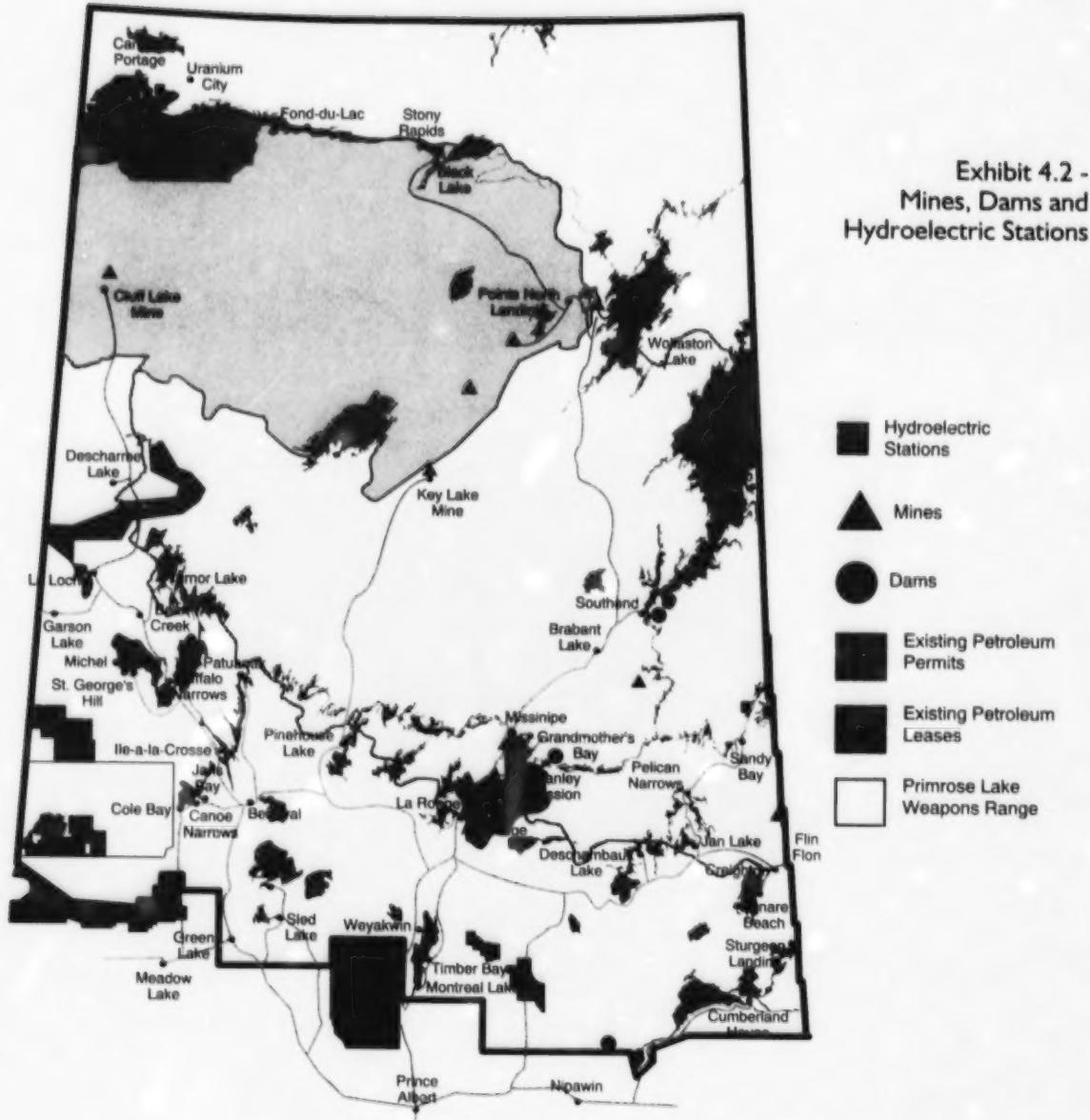


Table 4.4 Mines in the Boreal Shield Ecozone

Mine Name	Type	Location	Status
Cigar Lake	U	Waterbury Lake	Test mining, assessment approval, no ore milled
Cluff Lake	U	Carswell Lake	Active mining, scheduled to suspend in June 2000
Key Lake	U	Russell Lake	Preparing to mill McArthur River ore
McArthur River	U	Yallowega Lake	Test mining, assessment approval, no ore milled, under construction
McClean Lake	U	Wollaston Lake	Mining ore and waste, awaiting operating approval for milling and tailings disposal
Midwest Project	U	Points North	Inactive, assessment approval, temporarily closed
Rabbit Lake	U	Wollaston Lake	Mining stockpiled ore, refitting mill to process Cigar Lake ore
La Ronge Uranium	U	Stanley Mission	Abandoned - no detectable radioactive contamination
Contact Lake	Au	Lac La Ronge Provincial Park	Decommissioned.
Komis/Jalu Project	Au	McLennan Lake/Brabant	Temporary closure, beginning decommissioning
Seabee Mine	Au	Laonil Lake	Active mine
Newcor Mine	Au	Creighton	Abandoned - cleaned up in 1989
*Prince Albert Mine	Au	Amisk Lake	Abandoned - cleaned up in 1990
Callinan/Flin Flon Mine	Cu, Zn	Creighton	Operating, extensive tailings in Saskatchewan associated with the original Flin Flon deposit
Konuto Mine	Cu, Zn	Denare Beach	Active Mine
Flexar Mine	Cu, Zn	Creighton	Abandoned - shaft sealed

Table 4.4 Mines in the Boreal Shield Ecozone (continued)

Birch Lake Mine	Cu	Creighton	Abandoned - shafts sealed
Coronation Mine	Cu	Creighton	Abandoned - cleaned up in 1990
*Rottenstone Mine	Cu, Ni, Au, Ag	100 km north of La Ronge	Abandoned - condition unknown
*Western Nuclear	Pb, Cu, Au, Ag	Hanson Lake	Abandoned - condition unknown
*Anglo Rouyn	Cu, Au, Ag	Lac La Ronge Bay	Abandoned - tailings being examined for gold extraction
Jasper	Au	McLennan Lake	Decommissioned, reclaimed and released
Bootleg Lake Mine	Au	Creighton	Abandoned - clean-up being managed by SERHM, using financial assurance money
Star Lake	Au	McLennan Lake	Decommissioned, monthly monitoring
Laurel Lake	Au	Amisk Lake	Test mining
*Preview Lake	Au	Pap Lake	Abandoned - condition unknown
Hanson Lake	Silica sand	Hanson Lake	Pilot project

The installation of power transmission lines can be a contentious issue in northern Saskatchewan. Their environmental and aesthetic impacts have sparked debates between utility companies and residents in several communities. Like roads, power lines may also increase access to wilderness areas.

4.4.4 Trapping

Twenty-one species of mammal are trapped for their fur in Saskatchewan forests. Among the most important are beaver, muskrat, lynx, black bear, wolf, fox, coyote, marten, mink, otter, and squirrel.⁸ For several reasons, trapping's importance as an economic activity has declined considerably from historic levels. However, the number of pelts harvested in 1996-97 was 50% greater than in 1995-96. Table 4.3 shows the average number of animals trapped per year between 1992-93 and 1996-97.

Table 4.5 - Avg. Commercial Harvest of Furbearers in Saskatchewan, 1992-93 to 1996-97

Species	# Taken	Species	# Taken	Species	# Taken
Beaver	31,378	Marten	3,083	Coyote	9,805
Muskrat	54,861	Fisher	2,091	Red fox	3,855
Red squirrel	7,799	River otter	1,143	Arctic fox	63
Ermine	3,642 (combined)	Wolverine	9	Lynx	580
Long-tailed weasel		Badger	309	Bobcat	11
Least weasel		Striped skunk	14	Black bear	178
Mink	3,033	Grey wolf	238	Raccoon	747

Source: State of the Environment Report: The Boreal Shield Ecozone, SERM, 1999.

4.4.5 Commercial Fishing

In Saskatchewan, roughly 1,000 commercial fishing permits are issued annually to about 600 commercial fishermen. Much of Saskatchewan's commercial fishing activity takes place on roughly 200 lakes within or on the borders of the Boreal Shield Ecozone. The key species taken are whitefish, lake trout, walleye, and northern pike, and other (mullet, tullibee, perch, sturgeon, burbot and goldeye).

⁸

Saskatchewan Integrated Forest Resource Management Plan, Part A: Management Plan, 1995.

Table 4.6 - Commercial Fish Harvest in the Boreal Shield, 1996-97

Species	Kilograms	Percentage
Whitefish	444,326	26.68%
Lake Trout	313,450	18.82%
Northern Pike	258,864	15.55%
Walleye	269,019	16.16%
Others	381,392	22.90%
Total	1,665,133	100.00%

Source: State of the Environment Report, SERM, 1999.

The Boreal Plain Ecozone also has a significant commercial fishing industry. The fishery is important in the Boreal Plain, employing approximately 1,000 people on a part-time basis. The important species are identical to those in the Boreal Shield, as Table 4.6 shows.

Table 4.7 - Commercial Fish Harvest in the Boreal Plain Ecozone, 1993-94

Species	Kilograms	Percentage
Whitefish	263,900	20.30%
Lake Trout	2,600	0.20%
Northern Pike	321,000	24.70%
Walleye	683,800	52.60%
Others	28,700	2.20%
Total	1,300,000	100.00%

Source: State of the Environment Report, SERM, 1995.

4.4.6 Wild Rice

Wild rice, which is native to the Canadian Shield surrounding the Great Lakes, has been introduced in northern Saskatchewan over the past 50 years. It is grown commercially by over 200 permit holders in the north, although they do not all harvest rice every year. All wild rice produced in Saskatchewan is grown organically. It is processed at plants in La Ronge and Denare Beach and distributed in markets across North America and Europe.

4.4.7 Specialty Forest Products

Specialty forest products can be described as products developed from the natural substances found in the forest.⁹ According to Mater Engineering, which performed a study in the Weyerhaeuser FMA, some specialty forest products include boughs, twigs, cones, bark, tree tops, mosses and lichens, which are used in floral arrangements and crafts. Other products include oils and extracts, bark, herbs, botanicals, natural foods, and wild foods such as berries, mushrooms, and fern fiddleheads.

4.4.8 Subsistence Hunting, Fishing, Trapping, and Gathering

Subsistence uses of the northern environment are very important to many northern residents. Foods such as wild meat, berries, and mushrooms help to offset the effects of widespread unemployment in the north. Although little data is available to measure the economic importance of subsistence activities, it is safe to assume that they are integral to the lives of many northern residents.

4.5 Legislation and Regulatory Agreements

The responsibility for tourism development in Saskatchewan falls under the mandate of Tourism Saskatchewan, which receives funding from Saskatchewan Economic and Co-operative Development. Table 4.5 presents a brief summary of other regulatory bodies who have jurisdiction over other northern resources and issues.

⁹ State of the Environment Report, SERM, 1999.

Table 4.8 - Provincial Government Departmental Organization

Department/Agency	Branch	Resource/Impact
Saskatchewan Agriculture and Food	Lands and Regulatory Management	<ul style="list-style-type: none"> • Responsible for agricultural Crown land Management.
Saskatchewan Economic and Co-operative Development	N/A	<ul style="list-style-type: none"> • Develops and oversees Tourism Saskatchewan regulations.
Saskatchewan Energy and Mines	Mines Branch	<ul style="list-style-type: none"> • Responsible for mineral resource management.
	Resource Policy and Economics Division	<ul style="list-style-type: none"> • Identifies, analyses, and develops policies to promote mineral and energy development.
Saskatchewan Environment and Resource Management	Commercial	<ul style="list-style-type: none"> • Monitors air pollution; manages solid waste disposal; promotes rehabilitation of contaminated sites.
	Environmental Assessment	<ul style="list-style-type: none"> • Reviews and evaluates environmental impacts of proposed developments.
	Fisheries	<ul style="list-style-type: none"> • Develops and manages fisheries protection and management policies and programs.
	Forest Fire Management	<ul style="list-style-type: none"> • Provides and coordinates forest fire management activities and policies.
	Forestry	<ul style="list-style-type: none"> • Develops and manages integrated sustainable forest resource management programs and services.
	Parks and Facilities	<ul style="list-style-type: none"> • Develops and manages programs and policies for provincial and regional parks and protected areas.
	Policy and Public Involvement	<ul style="list-style-type: none"> • Coordinates the development of environmental and resource management policies, strategies and partnerships.
	Sustainable Land Management	<ul style="list-style-type: none"> • Coordinates integrated resource management policies and plans and administers resource lands activities.
	Municipal Wildlife	<ul style="list-style-type: none"> • Monitors quality of Saskatchewan's surface and groundwater. • Develops and manages sustainable wildlife programs and policies.
Saskatchewan Highways and Transportation	N/A	<ul style="list-style-type: none"> • Responsible for road and infrastructure development.

Table 4.8 - Provincial Government Departmental Organization (Continued)

Department/Agency	Branch	Resource/Impact
Saskatchewan Intergovernmental and Aboriginal Affairs	Aboriginal Affairs	<ul style="list-style-type: none"> Coordinates provincial obligations in implementing treaty land entitlement agreements. Facilitates employment opportunities for Aboriginal peoples across the public and private sectors.
Saskatchewan Municipal Affairs, Culture and Housing	Community Planning and Advisory Services	<ul style="list-style-type: none"> Provincial Land Use Planning Initiatives, Municipal Government Structures, and Private Land Development e.g., Private Forests Administers <u>The Heritage Property Act</u>, which facilitates heritage resource management and development. Through the Archaeological Resource Management Program, forest resource developments are routinely reviewed for possible heritage concerns.
Saskatchewan Northern Affairs	N/A	<ul style="list-style-type: none"> Promotes the social and economic development of northern Saskatchewan communities.
Sask Power	N/A	<ul style="list-style-type: none"> Responsible for all power and transmission lines.
SaskTel	N/A	<ul style="list-style-type: none"> Provides telephone service to all areas of the north.
Saskatchewan Water Corporation	N/A	<ul style="list-style-type: none"> Reviews all activities that affect water and related land resources. Develops management plans for water basins.
Saskatchewan Wetland Conservation Corporation	N/A	<ul style="list-style-type: none"> Coordinates the North American Waterfowl Management Plan (NAWMP) activities in Saskatchewan and generally guides wetlands and waterfowl habitat initiatives.

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Section 5.0

Tourism Market Discussion

5.0 Tourism Market Discussion

5.1 Global Tourism Performance and Canada's Position

Globally, the tourism industry generated nearly \$450 billion (US currency) in international tourism receipts in 1997 (World Tourism Organization, 1997). At the global level, industry performance is measured in six different geographic regions: Africa, Americas, East Asia/Pacific, Europe, Middle East, and South Asia. The Americas, which include 51 countries, received roughly 26% of international tourism activity in 1997.

In the Americas, Canada is the third most visited destination for international travellers, following the United States and Mexico. In 1997, total tourism spending in Canada reached \$44.0 billion, of which \$12.7 billion was generated by international travellers. Based upon these World Tourism Organization expenditure statistics, Canada holds roughly 3% of the international tourism market. This market share positions Canada as ninth in the global race for international visits with a total of 17.5 million international visitors, while United States is second with 48.9 million (WTO).

In 1998, 18.8 million people came to Canada for overnight trips, roughly a 7% increase over 1997 (The Daily, Statistics Canada). Nearly 80%, or 15 million of these overnight trips were generated from the United States, while the balance were generated from the Overseas markets. The increase in US overnight visitation from 1997 to 1998 was strong enough to offset a 7.1% decrease in travel to Canada from Overseas markets.

The decline in Overseas visitation to Canada was symptomatic of factors such as high unemployment, poor economic performance, and weak currencies in certain global regions, specifically Asia/Pacific. Aside from the United States, Canada's most important overseas markets include the United Kingdom, Germany, France, and Japan. Trips to Canada have become less costly for residents of these countries as currencies recover and first quarter indicators (Statistics Canada, 1999) have measured increases in inbound travel to Canada, although it is assumed these increases are dominated by business travel.

Travel to Canada from the United States set records in 1998 and the first quarter of 1999. During this period there was strong consumer confidence recorded in the United States, and the performance of the US dollar against the Canadian dollar made trips to Canada more affordable. The second quarter of 1999 has seen a decline in the growth of the US overnight market which is linked with the slight gains made by the Canadian currency.

There are roughly 4 million American tourists spending at least one night in western Canada

each year. Their interest in products can be clearly matched with the northern tourism industry in Saskatchewan. The future performance of the northern Saskatchewan tourism industry is strongly linked with its ability to effectively develop for and market to the US.

5.2 Domestic Travel - Canadian Activity

Spending by Canadian travellers in Canada represented 70% of total tourism expenditures in 1998 (Statistics Canada). Roughly 90% of total domestic travel was generated by people travelling in their own province (intra provincial). Trips between provinces (interprovincial) generated the balance of the domestic activity, although it accounted for 40% of the total travel expenditures made by Canadians.

1998 represented a reversal in trends relating to primary trip purpose. The primary motivation for travel is usually segmented into trips for pleasure, to visit family or friends, for business, or for personal reasons (e.g. funeral). In 1998, Canadians were motivated to travel within Canada more for pleasure (53.8 million trips) than for any other reason. Historically, travel for the primary purpose of visiting friends and relatives (VFR) generated the most domestic visits of the primary trip purposes.

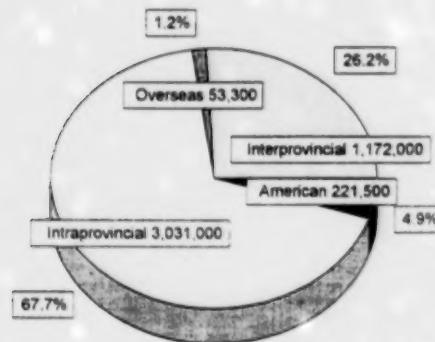
In 1998, economic situations were stronger than in 1997, and with higher levels of employment and growth in personal disposable income, expenditures related to travel grew in almost every area. The strong increase in pleasure travel is assumed to be linked directly with the drop in the total number of Canadians visiting the United States due to the weak performance of the Canadian dollar versus the United States dollar. It is forecasted that the total volume of interprovincial pleasure travel will drop over the next few years if the Canadian dollar gains ground against the US dollar.

5.3 Saskatchewan's Market Share and Performance

The measurement of total visits includes both same-day trips and overnight trips. Both are defined as requiring a minimum one-way trip distance of 80 kilometres. The same-day trip segment offers little potential to tourism developers in the Northern Administrative District (NAD), due to the distances between the NAD and major markets.

In 1998, nearly 4.5 million overnight visits were taken in Saskatchewan. Exhibit 5.1 (page 7-3) shows the breakdown of overnight visits by intraprovincial (Saskatchewan residents), interprovincial (other Canadians), Americans, and Overseas (all international countries other than the United States). Roughly 68% of total overnight visits in Saskatchewan are generated by Saskatchewan residents.

Exhibit 5.1 Origin of Overnight Visits



When considering the segments of the markets that can be influenced, marketing and development focus for the NAD should be placed mostly on those visitors travelling for the primary purpose of pleasure. VFR segments should not be overlooked entirely, however, as many visitors combine VFR visits with pleasure activities and hosts can often influence the travel decisions of their guests.

Roughly one quarter (22%) of the travel to Saskatchewan by residents of Canada (interprovincial) was for the primary purpose of pleasure. This segment represents a total of 260,000 overnight trips. This compares to 43% for American overnight visits and 53% for Overseas overnight visitors. When added to the 995,000 overnight visits taken in Saskatchewan by Saskatchewan residents, and the total pleasure market size based upon 1998 statistics is roughly 1.378 million trips (Table 5.1).

Table 5.1 Overnight Pleasure Travel to Saskatchewan (1998)

Geographic Market	Total Trips	Pleasure Trips	Percentage
Saskatchewan	3,031,000	995,000	33%
Canada	1,172,000	260,000	22%
United States	221,500	95,000	43%
Overseas Residents	53,300	28,000	53%
Total	4,477,800	1,378,000	31%

As a province, Saskatchewan realized the fifth highest volume of domestic travel (the total of intraprovincial and interprovincial) of the Canadian provinces (1998 Statistics Canada, Domestic Travel). Saskatchewan's 7.5 million domestic trips represented roughly 5% of total domestic travel, roughly 5% of total intraprovincial trips, and slightly more than 7% of interprovincial travel activity.

When considering overnight travel to Canada from international markets, Saskatchewan's market share is smaller than that of domestic travel. In 1998, Saskatchewan captured 1.5% of the total overnight trip activity from Overseas markets to Canada, and captured 1.4% of the overnight trip activity in Canada generated by American residents.

5.4 Activity Preferences of Visitors

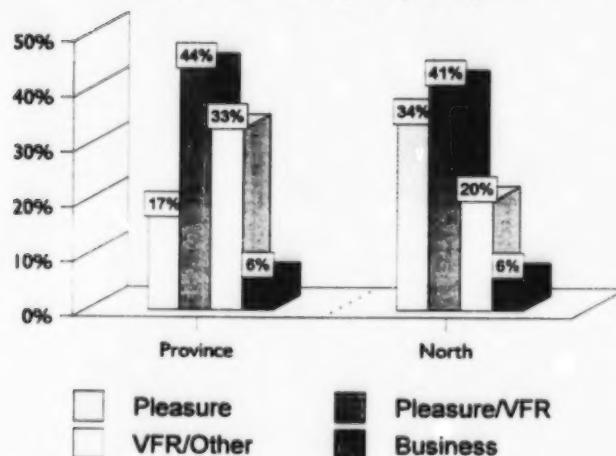
The activity most frequently participated in while taking an overnight trip in Saskatchewan is visiting friends or relatives, which is an activity for over three quarters of all overnight visitors. Following this, the top ten activities are (for all geographic points of origin): shopping (31%), sightseeing (16%), walking or hiking (11%), swimming (10%), bar/nightlife (9%), visiting a provincial or national park (9%), attending a sporting event (7%), other sports (7%), fishing (6%), and other water-based activities (6%).

5.5 Tourist Activity in the North

It is difficult to provide a statistical representation of travel activity in the NAD. For the purposes of collecting travel statistics (Canadian Travel Statistics - CTS), the province is broken into five geographic regions. The southern border of the northern region stretches from Cumberland House in the east, drops as it moves west to include Prince Albert, and runs west to reach the Alberta border just north of Lloydminster. This CTS region includes the city of Prince Albert, and destinations such as Prince Albert National Park and Meadow Lake provincial park, which together influence the statistics to a great degree.

The northern CTS region benefited from nearly 100,000 overnight trips taken by Canadians in 1998, which represents roughly 2.3% of the total amount registered by the province. A clear distinction between the north and other areas of the province lies in the primary trip purpose. People travelling to the north are far more likely to be on a pleasure trip than people travelling to other areas of the province. As Exhibit 5.2 shows (page 7-5), 34% of visitors to the north are travelling for the primary purpose of pleasure. This is twice the average for the province, where pleasure was the primary purpose for travel for 17% of the total visits.

Exhibit 5.2 Primary Trip Purpose



As Table 5.1 (page 5-3) shows, there were roughly 4.2 million overnight person trips taken by Canadian residents in Saskatchewan in 1998. Of these, roughly 3 million were generated by residents of Saskatchewan, while residents of other provinces generated 1.172 million overnight visits, or 28% of the total Canadian activity. The north, by comparison, relies more heavily on Saskatchewan residents for its share of overnight visits. Residents from provinces other than Saskatchewan account for only 4% of the total overnight activity in the north generated by Canadian residents.

Traditionally, hunting and fishing are activities that are directly linked with travel in the north. In 1998, nearly half a million (490,000) overnight visitors from Canada (including Saskatchewan) participated in either hunting or fishing activities. The total number of overnight visits to the north reached only 95,000 that same year. This shows that less than 20% of the hunting and fishing undertaken by tourists happens in the north. Aside from visiting friends or relatives, however, fishing was an activity for nearly half of all the overnight visitors to the north.

Trip spending related to the north represented less than 2% of the total trip spending in the province of Saskatchewan (including same day and overnight travel activity). Total spending in the north is strongly impacted by the accommodation choices made by people travelling in the north. Hotels and motels were the accommodation choice of nearly 33% of pleasure visitors in the province as a whole. In the north, slightly less than 6% of the pleasure visitors stayed in motels or hotels, while 28% preferred to camp.

As a percentage of the total spending, pleasure travellers generated a far greater portion of the total spending in the north than pleasure travellers did in the province as a whole.

5.6 Implications

A review of the current market performance identifies both opportunities and challenges for tourism developers and marketers in the NAD. Canada currently captures 17.5 million international visits each year. One half of one percent of this market represents 87,500 tourists. There are four million Americans that spend at least one night in western Canada each year. One percent of this market segment represents 40,000 trips.

One half or one percent of the total market seems attainable, however, the NAD faces specific, unique challenges. While its remoteness is one of its key assets, it narrows the total market potential in a number of ways.

- ▶ Many international visitors include Saskatchewan as one destination on a broader trip itinerary. The north does not have any significant horizontal travel corridors (those that run east/west), meaning the NAD has less of a potential to feed off of corridor traffic.
- ▶ Due to its location, there are no large pockets of population that can be cultivated. Same day trips, which represent almost half of the travel activity in other areas, are not an opportunity for developers in the NAD.
- ▶ As the NAD is more sparsely populated than other regions of the province, there is a lower level of trips generated for the purpose of generating friends and relatives. Statistics have already shown that the pleasure traveller is a greater proportion of the overall activity in the north than it is in other regions.
- ▶ For most tourists, a trip to the NAD would be a destination trip. It would require multiple days — which means more time and more planning.

These considerations imply that the total tourist market for the NAD is a narrow slice of the total international market, or the total American market currently touring western Canada. Increasing market share in provincial, Canadian, or international markets will require developers in the NAD to be strongly competitive with their product development, and innovative in their communication with potential segments.

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Section 6.0

Issue Discussion

6.0 Issue Discussion

6.1 Introduction

The issues presented in this section are based upon a review of the minutes and issue summaries generated by the NSTTT. An issue typology (page 6-2) has been developed for the purpose of presenting those issues that have been identified to this point, and issue frameworks have been prepared for each.

The identification of the issues and the development of these issues into frameworks for presentation purposes has been based upon the consultant team's interpretation of the available information. It is important to recognize that this information has been generated for discussion purposes only and is meant to serve as a base from which a final set of issue frameworks and the related typology can be established.

Exhibit 6.1 - Issues Typology

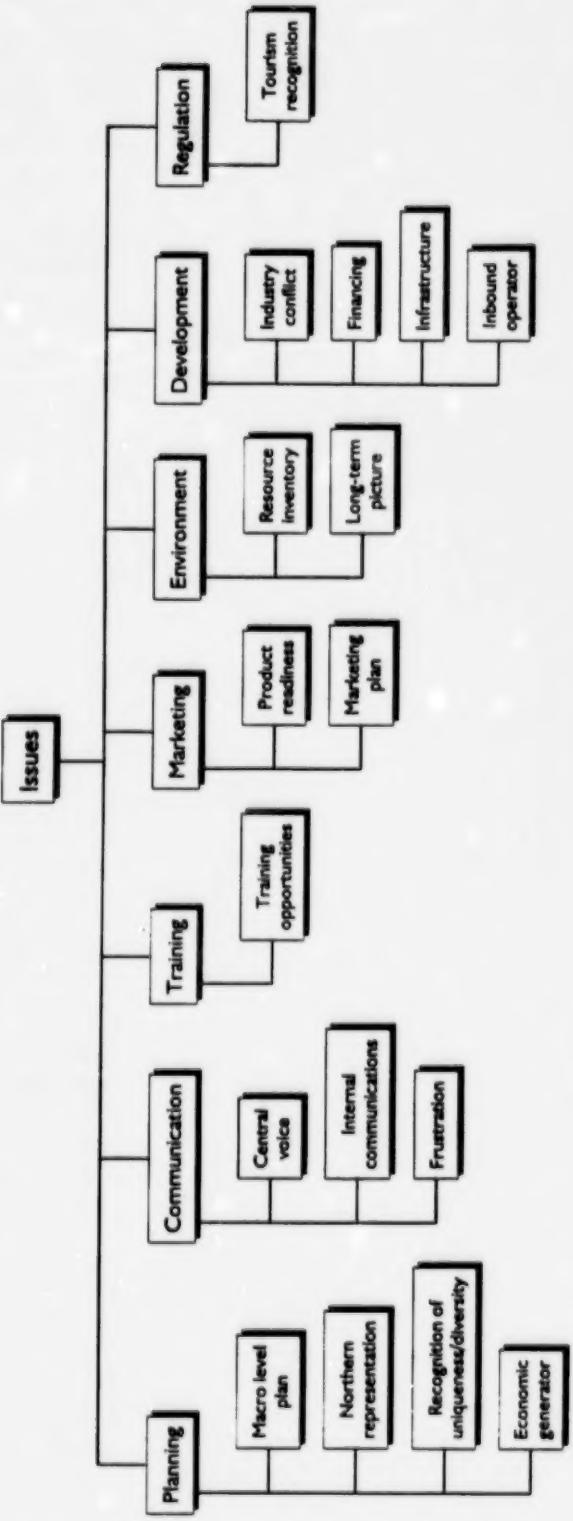


Table 6.1 - Northern Tourism Issue Frameworks

Issue Segment - Planning	
Statement	Explanation
► The current state of 'macro level' tourism planning for the north is inadequate.	► Tourism in the north is represented by a wide range of stakeholders who generally work in isolation of each other. A comprehensive tourism development (both program and capital) and marketing plan would more effectively direct these efforts.
Implications	
► Micro level planning is restricted or overlooked due to the lack of its role in the larger development and marketing picture. Tourism development planning that exists at the micro or site level tends to be narrow and/or site-specific with limited assessment of broader market opportunities and barriers.	► Attractiveness in making investments is hampered because the depth of tourism-related opportunities and their related challenges need to be better identified.
► Market opportunities are missed due to a lack of coordinated or partnership-based product development and marketing. This means lost potential revenues and employment.	► Product development is done in isolation which in turn fosters unhealthy competition and an imbalance in product supply. Independent operators and suppliers do not know where they fit in the overall northern tourism industry.
► The tourism industry cannot effectively represent itself at planning tables because a common, shared position and plan does not exist.	

Table 6.1 - Northern Tourism Issue Frameworks (continued)

Statement	Issue Segment - Planning	Explanation	Implications
<ul style="list-style-type: none"> There is the perception that northern tourism stakeholders' positions are not always well-represented in strategies or plans that affect or impact the north. 	<ul style="list-style-type: none"> Northern residents and industry representatives generally feel the input they provide to planning groups does not receive appropriate representation in the eventual completed plans and strategies that affect the north. Many feel that the opportunity for input is not consistently provided, or their input does not receive appropriate or adequate attention. 	<ul style="list-style-type: none"> Lack of faith in the integrated planning process is fostered as northern residents feel their input is overlooked. This snowballs and reduces northern resident input into planning. 	<ul style="list-style-type: none"> The credibility of those northern residents is damaged as their input is overlooked and they are questioned on their ability to represent the northern position. There is reduction or turnover in the volunteer pool required for effective representation due to lack of faith in process. 'Changing players' result in mixed messages being sent to planners and policy makers. Planning exercises are continually 'reinventing the wheel' as processes break down mid-stream.

Table 6.1 - Northern Tourism Issue Frameworks (continued)

Issue Segment - Planning	
Statement	<ul style="list-style-type: none"> There has been limited recognition of the uniqueness and diversity of the north by the province's tourism planners and developers.
Explanation	<ul style="list-style-type: none"> The planning and development of the province's tourism industry generally do not provide for input from northern residents or stakeholders even though the industry's activity does carry an impact on northern lifestyles.
Implications	<ul style="list-style-type: none"> The natural and cultural sensitivities are not effectively recognized or assessed which can lead to local environments being negatively impacted. Opportunities for increasing resident involvement in planning and ensuring appropriate local benefits are not effectively pursued. Friction between northern residents and tourists grows due to frustration with the tourism industry, which has long-term impact on market perception. Consultation with representatives of the northern tourism industry is inadequate as smaller-scale operators and suppliers — the backbone of the northern industry — are overlooked.

Table 6.1 - Northern Tourism Issue Frameworks (continued)

	Issue Segment - Planning
Statement	<ul style="list-style-type: none">► Tourism is generally overlooked at the local level as an economic generator.
Explanation	<ul style="list-style-type: none">► There is a low level of awareness or no recognition of the role that dollars generated by the tourism industry play in the community.
Implications	<ul style="list-style-type: none">► Planning in the north is dominated by industries other than tourism.► There is a loss of other economic opportunities, e.g. service industries.► The ability of the tourism industry to contribute to sustaining and developing cultural resources is not understood and therefore the cultural benefits are not realized.

Table 6.1 - Northern Tourism Issue Frameworks (continued)

	Issue Segment - Communications
Statement	<ul style="list-style-type: none"> There is no central voice or group of voices for, or clear point of access to, the northern tourism industry.
Explanation	<ul style="list-style-type: none"> The northern tourism industry comprises a wide variety of stakeholders. There is no recognized organization or individual that has the authority to represent and speak on behalf of the northern tourism industry.
Implications	<ul style="list-style-type: none"> There is little to no coordinated input from the tourism industry into land and resource usage plans. Tourism industry issues are commonly bumped or overlooked during the discussion of non-tourism industry issues because of a lack of coordinated and common pressure from the northern tourism industry. Tourism is always playing 'catch-up' — responding too late to plans that affect the north — which reduces the northern tourism industry's ability to influence development decisions that affect its resources.

Table 6.1 - Northern Tourism Issue Frameworks (continued)

	Issue Segment - Communication
Statement	<ul style="list-style-type: none"> ► Limited communication among northern tourism stakeholders reduces the potential for the industry in the north.
Explanation	<ul style="list-style-type: none"> ► Partnerships optimize investment and increase market impact. The different cultures and long distances in the north contribute to the low levels of communication. This reduces the potential for partnerships in tourism, and in turn, reduces overall investment and market impact.
Implications	<ul style="list-style-type: none"> ► Poor communication means that efforts are duplicated, many new activities fail to take advantage of past experiences, and some necessary activities are not carried out. ► Limited communication fosters unhealthy competition at the local level as different proponents pursue the same perceived opportunity independently of each other. ► Expectations for tourism in the north are generally raised beyond realistic levels as information about the development and marketing challenges is not shared. ► The limited investment available for the north is not optimized because partnerships are not formed.

Table 6.1 - Northern Tourism Issue Frameworks (continued)

	Issue Segment - Communication
Statement	<ul style="list-style-type: none"> ▪ Northern stakeholders and residents are frustrated with regards to being recognized and heard in planning and policy environments.
Explanation	<ul style="list-style-type: none"> ▪ Northern residents do not have the opportunity to provide, or are reluctant to provide, input. They feel, based on precedence, that their opinions and direction will not be recognized or taken into account by planning agencies and that local issues are not accounted for.
Implications	<ul style="list-style-type: none"> ▪ Northern residents remove themselves from the planning table because of frustration with not having their input recognized and reflected in planning. ▪ Not all industry stakeholders may be sufficiently represented at the planning table due to the politicization of the planning process. ▪ Opportunities in the tourism industry are not taken advantage of and local benefits are not realized. ▪ Issues regarding natural and cultural sensitivities are not put forward from the perspective of northern residents or stakeholders.

Table 6.1 - Northern Tourism Issue Frameworks (continued)

	Issue Segment - Training
Statement	<ul style="list-style-type: none"> There are few appropriate training opportunities for northern tourism industry stakeholders.
Explanation	<ul style="list-style-type: none"> Widely held standards and industry training programs are not applicable and/or accessible to northern residents interested in tourism, meaning the programs are not accessed and the residents' skills are not expanded.
Implications	<ul style="list-style-type: none"> Limited knowledge of marketing and its requirements means poorly made decisions regarding investments in marketing. Limited training or limited awareness of the value of training, dilutes the industry's ability to generate and retain revenues. Specific areas of importance include management (business) training and hospitality training for front-line staff. Entrepreneurs cannot access support and/or business counselling services from their point of operation. The isolation of many operations from a potential source means these services are not accessible within the time frame they are required. Communities, operators and those employed by the industry often do not understand the requirements associated with being market-ready. Unique skills associated with life-long learning experiences are not sufficiently recognized.

Table 6.1 - Northern Tourism Issue Frameworks (continued)

Statement	Issue Segment - Marketing
Explanation <ul style="list-style-type: none"> A large portion of the existing and proposed tourism products are not market-ready. 	Resources , both human and financial, are not being applied to ensure that the tourism product is ready or in an acceptable state to service new and incremental nature-based and adventure markets.
Implications	<ul style="list-style-type: none"> Returns on marketing and promotional efforts will be short-lived as a gap exists between the characteristics of market demand and the status of current product. Some visitors will have a marginal experience that will impact on long-term market appeal and market growth. Geographically distant markets (e.g. Europe and United States) often demand a high standard of product and service. If these expectations are not met, these lucrative markets' interest in northern Saskatchewan will diminish. Relationships with travel trade (e.g. agents, operators) cannot be established until appropriate products are market-ready.

Table 6.1 - Northern Tourism Issue Frameworks (continued)

	Issue Segment - Marketing
Statement	<ul style="list-style-type: none"> ► The north does not have a comprehensive and coordinated tourism marketing plan.
Explanation	<ul style="list-style-type: none"> ► A marketing plan sets the direction and activities for marketing. As resources are limited and clients are distant, pooling resources and identifying complementary markets are essential to cost-effective marketing.
Implications	<ul style="list-style-type: none"> ► Access to timely, relevant market data is limited and current data is inadequate or inappropriate to northern operators. ► Saskatchewan's northern tourism industry is not positioned to effectively take advantage of the market's interest in 'northern' tourism experiences. ► Individual operators are independently investing in marketing activities which are generally not cost-effective at an independent level. ► There is limited recognition that investments in marketing are required. ► There is a general lack of appropriate marketing partnership opportunities. ► There is currently a limited understanding of the market's perception of travel in the north.

Table 6.1 - Northern Tourism Issue Frameworks (continued)

Statement	Issue Segment - Environment
Explanation <ul style="list-style-type: none"> There is no accurate or up-to-date inventory of northern resources. 	<ul style="list-style-type: none"> Northern industry planning and development predominantly involve the use of the natural and cultural resources that are both renewable and non-renewable. Current inventory counts have not been conducted, meaning the current state of resources is not actually known.
Implications <ul style="list-style-type: none"> The impact of current development related to northern resources cannot be effectively assessed, as a current baseline inventory has not been prepared. The northern tourism industry's ability to focus on ethical and sustainable development, and to apply concepts such as carrying capacity, is restricted. Because of the lack of data, there is limited planning responsibility in resource-impacting decisions. 	<ul style="list-style-type: none"> Current decisions regarding resource allocation are based upon resource inventories that are dated and inappropriate for planning.

Table 6.1 - Northern Tourism Issue Frameworks (continued)

	Issue Segment - Environment
Statement	
Explanation	<ul style="list-style-type: none"> ► Tourism developers do not have confidence in the long-term existence of the north's resources.
Implications	<ul style="list-style-type: none"> ► Resource extraction is currently reducing the natural resources available for tourism and perception of future extraction agreements impacts the ability to plan investment in tourism.
	<ul style="list-style-type: none"> ► Concern regarding the impact of competitive resource usage restricts the appeal of investment in capital projects, as there are limited guarantees that the resource will not be altered by other resource users.
	<ul style="list-style-type: none"> ► Resource harvesting restricts the integrity of tourist destinations, limiting their appeal.

Table 6.1- Northern Tourism Issue Frameworks (continued)

	Issue Segment - Environment
Statement	<ul style="list-style-type: none">There is potential for conflict between the resource industry and the tourism industry.
Explanation	<ul style="list-style-type: none">Because of the competition for resources, tourism needs to be proactive and consider partnering with other resource users.
Implications	<ul style="list-style-type: none">Tourism is not seen as a feasible partner by other resource users.Tourism is overlooked by other resource users and therefore fails to gain the potential benefits of such partnerships.Users of the resource and tourism industries are not involved in co-management of the north's resources.

Table 6.1 - Northern Tourism Issue Frameworks (continued)

Statement	Issue Segment - Development	Explanation	Implications
<ul style="list-style-type: none"> ► Tourism developers have difficulty securing capital financing. 	<ul style="list-style-type: none"> ► Due to lenders' perceptions regarding factors such as location, seasonality, management, and inadequate planning, tourism developers and stakeholders cannot access the capital financing required to develop and market their products. 	<ul style="list-style-type: none"> ► Operators are not able to finance the period between marketing activities and sales when entering new markets. ► Older/marginal properties, or those properties making the market transition, are undercapitalized. ► Limited access to capital restricts the critical mass of product, which in turn restricts market appeal. ► Investment by organizations in tourism initiatives is limited. 	

Table 6.1 - Northern Tourism Issue Frameworks (continued)

	Issue Segment - Development
Statement	<ul style="list-style-type: none"> The current transportation infrastructure restricts client access.
Explanation	<ul style="list-style-type: none"> Most tourists access the north either by rubber tire (car, RV) or by plane. The current condition of the transportation infrastructure, both highways and airports, restricts access to northern destinations.
Implications	<ul style="list-style-type: none"> The poor maintenance of some air strips and the lack of access by major airlines limits the ability of the operator to cost-effectively bring in guests. The north's reputation for marginal roads and the lack of east-west travel corridors limits the appeal of the north, thus narrowing the market. The current network of tourist and destination signage restricts the ability of independent tourists to seek out northern tourism destinations.

Table 6.1- Northern Tourism Issue Frameworks (continued)

Statement	Issue Segment - Development	Explanation	Implications	
<ul style="list-style-type: none"> There are few resident inbound tour operators. 	<ul style="list-style-type: none"> Inbound tour operators and their respective knowledge are key components to the development of the northern tourism industry. The marketing - sales lag makes it difficult for interested operators to build relationships at the level required. 	<ul style="list-style-type: none"> Relationships with markets of interest cannot be established in the short term because credibility has not been established. Many current tour programs are implemented without local involvement and local return/benefits are minimized, as is the scope of the tour program. 	<ul style="list-style-type: none"> Long-term market development cannot be undertaken as the marketing/product linkage does not exist. Effective relationships have not been established with inbound tour operators. Operators using resources without local involvement create apprehension and intimidation within the local community. 	

Table 6.1 - Northern Tourism Issue Frameworks (continued)

	Issue Segment - Regulation
Statement	<ul style="list-style-type: none"> The northern tourism industry is not recognized as a key player in the setting of regulations and policies that impact the north.
Explanation	<ul style="list-style-type: none"> The broader tourism stakeholder community in the north does not believe it is consulted in regards to matters relating to regulations and licensing.
Implications	<ul style="list-style-type: none"> There is limited understanding or knowledge, as well as inconsistent application and interpretation, of current regulations and licensing approaches. This generates mistrust. Licensing standards are not balanced with traditional lifestyles. Conflicts arise over multiple uses of restricted resources which are allowed by current regulations. Current regulations restrict the ability of new operators to become involved in delivery of services which in turn restricts further development of the industry.

Section 7.0

Required Areas of Study

7.0 Required Areas of Study

7.1 Introduction

The Northern Saskatchewan Tourism Task Team worked to narrow the wide range of issues relating to tourism in the Northern Administration District down to a manageable and representative set. Section 6.0 of this report profiles these issues. It is important to recognize that although the listed issues are macro in nature, they illustrate concerns that are commonly held by those representatives of the tourism industry that participated in this process. In addition to this, although the report deals with macro issues, this in no way diminishes the importance of the micro issues, specifically those related to policy and regulation, that were raised in NSTTT meetings.

The majority of the macro issues are connected to two general themes. The first theme relates to a void in macro level planning for tourism in the north. The availability and inefficient use of capital resources, and the limited coordination of marketing are topics discussed in a general sense throughout the issue frameworks. The second theme relates to communication. Several issues relate to frustration linked with the limited recognition of northern input in planning, policy, and regulation processes.

The NSTTT's objective with the northern tourism industry assessment was to first put a face to the tourism industry of the Northern Administration District and secondly to cooperatively recognize a common set of key issues restricting industry development. This exercise represents another step towards the coordinated development of tourism in the north.

As a final component of the assessment, this section presents recommendations on areas of planning and study that might be considered as the next phase in this ongoing development process.

7.2 The Need for Planning

The issues impacting the development of tourism in the north suggest the need for industry planning related to the two themes of issues — macro planning and communications — mentioned above. A balance between industry planning and industry study will be needed to achieve this objective. Both planning and study will require the development of structures and processes that foster a more cooperative and united northern industry — one that must evolve through grass-roots participation and involvement at the community level. The development and marketing issues related to macro planning will require

integrated study related to the areas of market opportunities, product and service requirements, infrastructure challenges, and investment.

The overriding need for planning and study relates to the participating NSTTT members' belief that the Northern Administration District is unique in its challenges, opportunities, barriers, and constraints. A great deal of the current planning and research resources, as well as policy and regulations, do not apply to the north in the same manner as they apply to other areas of the province. Subsequent planning and research, therefore, must contribute to this notion of uniqueness and the identity of the northern tourism industry.

7.3 Phase Two Planning and Study Initiatives

The issue typology (page 6-2) breaks the issues into seven related segments. For the purpose of identifying priority areas of planning and study, this section groups these segments under two streams for the purpose of the discussion.

7.3.1 Planning Requirements

One of the most challenging issues related to the appropriate development of the northern tourism industry relates to the collection and management of northern input. This issue is often amplified as input from the north is under-represented in broader, province-wide planning that impacts the north.

The issues discussion is Section 6.0 identifies at least six key issues that can be linked with the challenges of both internal and external communication, and industry representation. The industry must focus its planning efforts on addressing the constraints and barriers associated with communication and representation before a coordinated development and marketing movement can be initiated.

The Northern Administration District requires the development of an industry structure that will provide an efficient channel for the flow of industry information both from northern industry stakeholders to planning bodies, as well as from these planning bodies to the northern industry. Due to the diversity, scale, and remote locations of stakeholders across the north, it is necessary that the communication structure be formalized to ensure credibility, while also providing a process through which grass-roots input can be gathered and information can be spread.

In order for recommendations on this structure to be developed, the following tasks should be considered.

- ▶ Identify recent planning processes where consultation with northern tourism stakeholders has been undertaken and where the process has broken down or the results of the process have not been positive. The objective of this exercise would be to identify the variables that allowed the process to break down.
- ▶ Review the structure of the Northern Saskatchewan Tourism Task Team and identify modifications required to ensure that balanced and appropriate representation exists, with specific attention to grass-roots representation.
- ▶ Clearly identify the task team responsibilities for information dissemination and consultation and then structure the processes for these activities.
- ▶ Develop recommendations on the promotion of the revised NSTTT both to the industry in the north and to the relevant planning bodies and representatives in the north, in addition to other parts of province.

Other industries in the north, those that often compete for the same natural resources that tourism does, have a greater profile with communities and residents due to their direct association with employment and generation of revenues. Further to this, those employed directly or indirectly by tourism often do not recognize that they are in the industry.

The visibility of tourism as a credible resource-based industry and employer needs to be raised with residents of the north. This is a long-term initiative that will require investment. Key requirements for this process include the following.

- ▶ Prepare a cyclical 'road-show' for tourism in the north. This community-based program should be designed for residents as well as industry stakeholders and operators. Content should focus primarily on the following areas: what tourism is, what the opportunities are for the north, what the issues are, who represents tourism, etc.

These community sessions should also gather input for the purpose of identifying issues and needs, and funnelling industry information to the grass-roots industry interests and proponents in the NAD.

- ▶ Northern tourism sessions should be delivered in a set of communities seen to be appropriate to ensure access.

7.3.2 Study Requirements

Some of the key challenges related to increasing the NAD's tourism market share were discussed in Section 5.6. As the tourism market is extremely competitive, and resources available for product development, training, and marketing are limited, setting a strategy that maximizes the energy and resources of the NAD is critical. Several of the issues brought forward by the NSTTT relate to the need for cooperation and the development of strategic plans that can facilitate this for the benefit of the industry. Three key areas of strategic study are required for the purpose of setting macro direction for NAD's industry stakeholders. These areas are development, marketing, and training.

Development

A development plan should clearly identify the types and groups of development required to increase the product appeal of the north, as well as provide recommendations on the optimal location, size, and number of each type of development. A more coordinated approach to development is needed so that the limited dollars available for investment can be optimized by linking development with clearly defined supply gaps.

It is important that the plan recognize all significant components of tourism in the north. Specifically, the plan should address the following requirements.

- ▶ Review market assessment information and prepare a comprehensive inventory of the key market segments that have potential for the northern tourism industry.
- ▶ Prepare a listing of product requirements related to each of the key market segments. This listing should clearly identify and define the specific product needs and components required to service each market segment.
- ▶ Review and update the current product and resource inventory. This review should include direct consultation with the appropriate representatives from the north to ensure all development plans currently under consideration or review are also identified.
- ▶ Prepare a detailed inventory of the development requirements needed to ensure the product supply effectively meets demand and that the product supply is market ready. This inventory should clearly present those areas where suitable product currently exists, where existing product requires modification to make it more appropriate, and where new development is required.

Once the inventory has been prepared, a development template must also be designed for use as a guide by developers. The requirements of this template include the following.

- ▶ Identify, through the use of resource inventories, which areas or regions of the north are most suitably matched for specific types of tourism and related development.
- ▶ Assess the current transportation and infrastructure network with the objective of identifying current and potential travel streams and destination hubs. This assessment should include discussions with appropriate representatives to identify infrastructure (i.e. new roads) that will come on line in the next decade. The availability and suitability of current air travel service should also be assessed with the objective of determining supply gaps and requirements.
- ▶ Identify a development template that provides general recommendations on the number and types of development, as well as guidelines for suitable locations of development. This template should include a clear indication of the different ranges of development required and how they will interface (i.e. flagship destination travel generators, outposts, linked services, etc.).

As a final requirement in the strategic development planning, the ability of the NAD and its industry proponents to capitalize the development requirements must be assessed. As a specific initiative, a task team with representatives from industry and government should be struck to identify and assess innovative options for capitalizing the development opportunities.

Marketing

The north does not have a comprehensive and coordinated marketing plan. Although aspects of the north are represented in the market by specific operators, sector associations, and tourism organizations such as Tourism Saskatchewan, marketing efforts of tourism stakeholders in the north are disjointed.

A coordinated marketing strategy would provide for the development of a common northern image and focus limited dollars towards priority markets. This strategy should include key strategic initiatives and identify priority tactical steps to be implemented over the next five years as development occurs and more northern product becomes market-ready.

The specific requirements of the marketing plan should include the following.

- ▶ Based upon a review of the current tourism and resource supply, segment the overall tourist market into appropriate and manageable market segments. These segments should recognize geographic differences, while also assessing the importance of key vertical markets perceived to provide opportunities.
- ▶ Using secondary information, develop a profile of these segments which includes a discussion of visitor needs and interests, market size, purchasing and travel preferences (e.g. independent, through travel agent), stage of market growth, and current trip activity.
- ▶ Provide recommendations on primary market research that should be conducted to supplement the secondary research and to more clearly define and quantify market opportunities.
- ▶ Prepare an inventory of the current marketing activities undertaken and expenditures made by the northern tourism industry. This inventory should be supported by a listing of the different agencies (e.g. Tourism Saskatchewan) that contribute to the marketing of the north and its tourism products.
- ▶ Identify through product and market matching analysis the primary and secondary market opportunities for the NAD and its industry stakeholders. Specific consideration should be given to the forecasting of these opportunities over the medium and long term to compensate for the lag between marketing initiatives and sales.
- ▶ Prepare an inventory of strategic marketing initiatives that should be acted on by the NAD and its industry stakeholders. The basis for each initiative should be clearly stated, and each initiative should be broken into tactical steps that outline the details and requirements of implementation.
- ▶ Identify the resource requirements for implementation of the tactical plan. To support this, identify areas where partnerships can be struck to maximize marketing investment by the NAD. Particular focus on the requirements of the marketing and sales process is important in the consideration of partnership opportunities.

Training

The ongoing growth and development of the tourism industry in the north is clearly linked with the ability of the industry to deliver appropriate, market-ready products to new clients. The core requirements of the market, both from a service and program basis, are not

negotiable. These requirements need to be clearly understood so that effective product and market matching can occur.

A great deal of the current training resources and programs are designed to serve the tourism industry on a common level. Although these programs effectively serve the broader industry, they are often inappropriate when applied in the north.

Training is a critical component of the development of the northern tourism industry as it will contribute to ensuring the market-readiness of suppliers, and it will provide knowledge that will enhance the profitability of tourism operators.

The planning requirements for addressing the training issue include the following.

- ▶ Identify the current providers of tourism and tourism business training by provider and program offered. This inventory should also include form of delivery and lines or point of access.
- ▶ Through consulting with current tourism stakeholders from the north, as well as with community and tourism committee representatives, identify a functional list of training requirements. This 'needs assessment' should also include the identification of preferred form of access, appropriate month(s), and form of delivery.
- ▶ Consult directly with tourism training providers and brokers (e.g. Saskatchewan Tourism Education Council) with the objective of identifying barriers to the delivery of training in the north.
- ▶ Prepare a summary inventory of the training needs of the tourism industry in the Northern Administration District which includes the setting of priorities.